SECTION B

SCHEDULE OF SUPPLIES OR SERVICE

B.1 DESCRIPTION OF SERVICES

The Contractor shall furnish all personnel, facilities, technology infrastructure, supplies, and services required to plan, implement, operate, and manage multi-channel contact center services as specified in Section C, Statement of Work (SOW).

B.1.1 Project Start-Up

Charges associated with Project Start-Up shall include one or more of the following:

- a) <u>Facility and Equipment</u> Costs incurred to prepare the site and systems at each center to support task requirements, including facility, equipment, supplies and services.
- b) <u>Initial/Special Training</u> Labor and supply costs incurred to develop training materials and to conduct training of the initial complement of Information Specialists (ISs) or any additional ISs above the initial complement needed to support task requirements (note that this does not include any training costs for new personnel to replace ISs who leave the project [for example, through attrition training] or for any on-going or refresher training conducted by the Contractor to ensure compliance with performance requirements).
- c) <u>Knowledge and Content Development</u> Labor and supply costs incurred to develop and prepare the knowledge base to support task requirements.
 - d) Project Implementation Support Labor, travel and supply costs incurred in support of start-up activities.

B.1.1.1 Facility and Equipment

This is a one-time charge to be paid for all facility, equipment, software, supplies and services needed at each center to support task requirements. The charge includes a fixed base component plus an incremental component.

B.1.1.2 Initial/Special Training

This is a one-time charge to be paid for labor and supply costs incurred to develop training materials and train the initial complement of ISs or any additional ISs above the initial complement needed to support task requirements. The charge can also be applied to any training or related activities directed by the Government to accommodate specific needs. The charge includes labor and supply costs for course development, training materials, and instructors and the labor costs for Information Specialists attending the training or related activities. This charge does not apply to any on going or refresher training conductor by the contractor to ensure compliance of performance requirements or training of replacement ISs due to attrition or other causes.

B.1.1.3 Knowledge and Content Development

This is a one-time charge to be paid for labor and supply costs incurred to develop the knowledgebase to support task requirements.

B.1.1.4 Project Implementation Support

This is a fixed fully burdened hourly charge for technical support needed during project implementation. This charge shall cover all work performed to make the contact center(s) fully operational, including achieving security certification and accreditation (C&A) on contractor's information systems in accordance with National Institute of Standards and Technology (NIST) and agency security requirements. Ongoing support for maintaining the facility and technology infrastructure and compliance with security requirements after C&A is achieved shall be included in Core Project Management and Incremental Project Management Support. Project Implementation Support functions may consist of support provided by one or more of the following labor groups, as defined in Sections C.3.5.2 through C.3.5.9:

- o Site Management
- o Program Management
- o Technology Management
- o Information Systems Security
- o Content and Knowledge Management
- o Contact/Case Management
- o Relationship Management
- Customer Satisfaction Survey

B.1.2 Project Management

This is a fixed charge to be paid for all technical and management services as defined in Section C.3.5 of the Statement of Work, including routine travel, as defined in Section H.15.1, required to support task requirements. The charge includes a Core Project Management Support component and, if necessary, an Incremental Support component. Core Project Management Support and Incremental Project Management Support cost components apply only to solutions involving dedicated resources. Project management support costs for shared or non-dedicated solutions are included in the hourly rate for such solutions.

B.1.2.1 Core Project Management Support

This is the fixed monthly charge to be paid for all work performed to support the project after the contact center(s) become fully operational, including all non-incremental core project management staff (e.g., Contractor's Project Manager, site manager, technical and security personnel, human resource personnel, administrative personnel, knowledge specialists, etc.), routine travel, and support services required to support task requirements. Core Project Management Support is the minimum resource level that the contractor has allocated in order to perform all of the project management functions identified in Section C.3.5 for each project complexity level for a dedicated single site solution. For dedicated solutions involving multiple sites and/or more complex implementation, the Contractor may augment the Core Project Management Support with Incremental Project Management Support identified in Section B.1.2.2 below.

B.1.2.2 Incremental Project Management Support

This is the fixed hourly charge for incremental support needed to accommodate specialized and unique requirements, or new requirements added subsequent to initial project implementation that require additional resources beyond those provided for under Core Project Management Support. The support may be ordered as a

one-time support for a specialized project or for recurring support to augment the Core Project Management Support. The incremental support may consist of support provided by one or more of the following labor groups, as defined in Section C.3.5.2 thru C.3.5.9:

B.1.3 Telecommunications Services, Automated Services, and Other Support Services

These are charges for services provided and maintained by the Contractor in support of task requirements for the duration of the performance period. Charges may include a one-time service initiation or change order charge and a monthly recurring or usage-sensitive charge. The one-time charge may be a fixed unit rate or hourly labor rate. The recurring charge may be a monthly charge or usage-sensitive charge based on a fixed unit or hourly labor rate.

B.1.4 Attended Services – Dedicated Solution

These are charges for providing attended services using resources that are dedicated to the specific task. The requisite skill levels of the Information Specialists utilized to provide the services are those defined in Sections C.3.2 and C.4 respectively. The "IS Hourly Rate" is the fully burdened fixed unit rate to be paid for each hour of work performed by an IS for a specific task. The fixed IS Hourly Rate reflects the blended hourly rate for work performed by an IS plus any support personnel (e.g., quality monitoring personnel, trainers, etc.) and any recurring costs associated with facility, equipment and software, and maintenance required to support the IS in the performance of task requirements.

B.1.5 Attended Services – Shared or Non-Dedicated Solution

These are charges for providing temporary or long-term attended services using non-dedicated resources provided and managed by the Contractor. The fixed unit rate reflects the fully burdened rate for work performed by an IS plus project management and any support personnel (e.g., project and site managers, supervisors, quality monitoring personnel, trainers, etc.) and any recurring costs associated with facility, equipment, and maintenance required to support the IS in the performance of task requirements. The charges are based on the actual handling time (including call wrap-up time) required for Information Specialists to respond to telephone and e-mail inquiries using prepared scripts/responses. Content for scripts/responses will be provided by the Government or developed by the Contractor. The charges are subject to a minimum service charge for specific minimum daily call volume commitment when the project is active. The minimum service charge shall not apply when the project is in the non-active state. "Non-active state" is defined as any days that the Government has specified in the task order and/or operating directives as non-business days. The minimum service charge is calculated based on the minimum daily call volume commitment multiplied by the number of days the project is active during the month. For tasks that require support beyond normal business hours, the minimum service charge is the aggregate of the service charges for each time period of coverage (Normal Business Hours, Nights, Saturdays and Sundays, Holidays) during the month.

B.2 PRICE TABLES

Prices identified in this section represent the ceiling prices for each of the contract items for the two-year base period, and each of the contract's four (4) two-year option periods.

The pricing tables also contain Extended Periods. Each Extended Period is one year in length. The purpose of the extended periods is to allow the Government to issue a task order, with a maximum performance period of five years, up to the last day of the last contract option period that is exercised

The Contractor may bid a lower price for any contract items in response to a task order request. The unit prices contained in the price tables below are used to create the one-time and recurring charges for individual task orders.

B.2.1 Project Start-Up

B.2.1.1 Base Facility and Equipment (For Each Center)

Table B.2.1.1-1 Base Facility & Equipment - Fewer than 25 Equivalent Workstations

CLIN	Service Description	Unit of Issue	Base Period	Option Period 1	Option Period 2	Option Period 3	Option Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
10000	Phone & TTY Services	Each								
10001	Phone, TTY, Fax, & E-mail Services	Each								
10002	Phone, TTY, Fax, E-Mail, Web Chat Services	Each								
10003	Add Enhanced Quality Monitoring Solution	Each								

Table B.2.1.1-2 Base Facility & Equipment – Between 25 – 50 Equivalent Workstations

		x = quip =								
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
11000	Phone & TTY Services	Each								
11001	Phone, TTY, Fax, & E-mail Services	Each								
11002	Phone, TTY, Fax, E-Mail, Web Chat Services	Each								
11003	Add Enhanced Quality Monitoring Solution	Each								

Table B.2.1.1-3 Base Facility & Equipment – Between 51 – 100 Equivalent Workstations

CLIN	Service Description	Unit of Issue	Base Period	Option Period 1	Option Period 2	Option Period 3	Option Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
12000	Phone & TTY Services	Each								
12001	Phone, TTY, Fax, & E-mail Services	Each								
12002	Phone, TTY, Fax, E-Mail, Web Chat Services	Each								
12003	Add Enhanced Quality Monitoring Solution	Each								

Table B.2.1.1-4 Base Facility & Equipment - Between 101 – 250 Equivalent Workstations

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
13000	Phone & TTY Services	Each								
13001	Phone, TTY, Fax, & E-mail Services	Each								
13002	Phone, TTY, Fax, E-Mail, Web Chat Services	Each								
13003	Add Enhanced Quality Monitoring Solution	Each								

Table B.2.1.1-5 Base Facility & Equipment – Over 250 Equivalent Workstations

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
14000	Phone & TTY Services	Each								
14001	Phone, TTY, Fax, & E-mail Service	Each								
14002	Phone, TTY, Fax, E-Mail, Web Chat Services	Each								

				Base	Option	Option	Option	Option			
	CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
				Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
Ī		Add Enhanced Quality									
	14003	Monitoring Solution	Each								

B.2.1.2 Incremental Facility and Equipment (For Each Center)

Table B.2.1.2-1 Incremental Facility & Equipment - Fewer than 25 Equivalent Workstations

			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
		Each Equivalent								
20000	Phone & TTY Services	Workstation								
	Phone, TTY, Fax, & E-mail	Each Equivalent								
20001	Services	Workstation								
	Phone, TTY, Fax, E-Mail,	Each Equivalent								
20002	Web Chat Services	Workstation								
	Add Enhanced Quality	Each Equivalent								
20003	Monitoring Solution	Workstation								

Table B.2.1.2-2 Incremental Facility & Equipment – Between 25 – 50 Equivalent Workstations

i ubic i	J.Z. 1.Z Z	iai i aciiity & Equipiii	CIIC DO	WCCII 20	OO Equ	IVaicit VV	ornstation	13		
			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
		Each Equivalent								
21000	Phone, & TTY Services	Workstation								
	Phone, TTY, Fax, & E-mail	Each Equivalent								
21001	Services	Workstation								
	Phone, TTY, Fax, E-Mail,	Each Equivalent								
21002	Web Chat Services	Workstation								
	Add Enhanced Quality	Each Equivalent								
21003	Monitoring Solution	Workstation								

Table B.2.1.2-3 Incremental Facility & Equipment –Between 51 -100 Equivalent Workstations

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
		Each Equivalent								
22000	Phone & TTY Services	Workstation								
	Phone, TTY, Fax, & E-mail	Each Equivalent								
22001	Services	Workstation								
	Phone, TTY, Fax, E-Mail,	Each Equivalent								
22002	Web Chat Services	Workstation								
	Add Enhanced Quality	Each Equivalent								
22003	Monitoring Solution	Workstation								

Table B.2.1.2-4 Incremental Facility & Equipment – Between 101 – 250 Equivalent Workstations

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
23000	Phone & TTY Services	Each Equivalent Workstation								
23001	Phone, TTY, Fax, & E-mail Services	Each Equivalent Workstation								
23002	Phone, TTY, Fax, E-Mail, Web Chat Services	Each Equivalent Workstation								
23003	Add Enhanced Quality Monitoring Solution	Each Equivalent Workstation								

B.2.1.3 Initial/Special Training

B.2.1.3.1 Course Development and Training

Table B.2.1.3-1 Hourly Rate for Course Development and Training

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
30000	Level 1	Hour								
30001	Level 2	Hour								
30002	Level 3	Hour								
30003	Level 4	Hour								

B.2.1.3.2 Information Specialist (IS)/Supervisor Hourly Rate While In Training

This is the fixed unit rate to be paid for each hour an IS or IS Supervisor is in initial training in preparation of the task. Separate rates are provided for Normal Business Hours, Nights, Saturdays and Sundays, and Holidays, as defined below. This rate shall also apply for any training requested by the Government subsequent to the initial training.

Normal Business Hours are defined as the time period between 7:00 am to 9:00 pm local time, Monday through Friday, except designated federal holidays.

Nights are defined as the time period between 12:01 am and 7:00 am local time on Monday, and between 9:00 pm and 7:00 am local time, Monday through Friday, except designated federal holidays.

Saturdays and Sundays are defined as the time period between 12:01 am Saturday and 12:01 am Sunday, and between 12:01 am Sunday and 12:01 am Monday local time respectively.

Holiday hours are defined as the 24 hour period beginning at 12:00 midnight local time on the day of the holiday.

Table B.2.1.3.2-1 Information Specialist (IS) Hourly Rate (In Training) – English – Normal Business Hours

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
31000	Level 1	Hour								
31001	Level 2	Hour								
31002	Level 3	Hour								
31003	Level 4	Hour								
31004	Level 5	Hour								

Table B.2.1.3.2-1.a Information Specialist (IS) Hourly Rate (In Training) – English – Nights

	SILITIOIL TIG IIIIOTTIIGU	on opeolanet (10) met		\	9/:	9	9			
			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
31010	Level 1	Hour								
31011	Level 2	Hour								
31012	Level 3	Hour								

31013	Level 4	Hour				
31014	Level 5	Hour				

Table B.2.1.3.2-1.b Information Specialist (IS) Hourly Rate (In Training) – English – Saturdays and Sundays

CLIN	Service Description	Unit of Issue	Base Period	Option Period 1	Option Period 2	Option Period 3	Option Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
31020	Level 1	Hour								
31021	Level 2	Hour								
31022	Level 3	Hour								
31023	Level 4	Hour								
31024	Level 5	Hour								

Table B.2.1.3.2-1.c Information Specialist (IS) Hourly Rate (In Training) – English – Holidays

	D.Z. 1.J.Z-1 .C IIIIOITIIati		Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
	,		Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
31030	Level 1	Hour								
31031	Level 2	Hour								
31032	Level 3	Hour								
31033	Level 4	Hour								
31034	Level 5	Hour								

Table B.2.1.3.2-2 Supervisory Information Specialist (IS) Hourly Rate (In Training) – English - Normal

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
32000	Level 1	Hour								
32001	Level 2	Hour								
32002	Level 3	Hour								
32003	Level 4	Hour								
32004	Level 5	Hour								

Table B.2.1.3.2-2.a Supervisory Information Specialist (IS) Hourly Rate (In Training) – English - Nights

	TUDIC	3.2.1.3.2 2.a Supervise	ory information spec	iulist (13)	Hourry I	tate (iii ii	ullilligj	Lingilian	Mignis		
l				Base	Option	Option	Option	Option			
l	CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
ļ				Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
l											
ı	32010	Level 1	Hour								
ı											
ı	32011	Level 2	Hour								
l				Base	Option	Option	Option	Option			
l	CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
l				Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3

32012	Level 3	Hour				
32013	Level 4	Hour				
32014	Level 5	Hour				

Table B.2.1.3.2-2.b Supervisory Information Specialist (IS) Hourly Rate (In Training) – English – Saturdays and Sundays

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
32020	Level 1	Hour								
32021	Level 2	Hour								
32022	Level 3	Hour								
32023	Level 4	Hour								
32024	Level 5	Hour								

Table B.2.1.3.2-2.c Supervisory Information Specialist (IS) Hourly Rate (In Training) – English - Holidays

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
			,2	11 07 1	11 0 7 0	11 770	11 77 10	1 chou i	1 01100 2	1 chod o
32030	Level 1	Hour								
32031	Level 2	Hour								
32032	Level 3	Hour								
32033	Level 4	Hour								
32034	Level 5	Hour								

Table B.2.1.3.2-3 Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Normal Business Hours

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CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
33000	Level 1	Hour								
33001	Level 2	Hour								
33002	Level 3	Hour								
33003	Level 4	Hour								
33004	Level 5	Hour								

Table B.2.1.3.2-3.a Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Nights

						٠,					
				Base	Option	Option	Option	Option			
CI	LIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
				Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
33	3010	Level 1	Hour								

33011	Level 2	Hour								
33012	Level 3	Hour								
33013	Level 4	Hour								
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
33014	Level 5	Hour								

Table B.2.1.3.2-3 .b Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Saturday and Sunday

Table	D.Z. 1.3.2-3 .D IIIIOIIIIati	on specialist (is) no	urry Mate	(III IIIaiii	111g) - DI-	Linguai –	Jaluruay	and June	iay	
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
33020	Level 1	Hour								
33021	Level 2	Hour								
33022	Level 3	Hour								
33023	Level 4	Hour								
33024	Level 5	Hour								

Table B.2.1.3.2-3.c Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Holidays

			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
33030	Level 1	Hour								
33031	Level 2	Hour								
33032	Level 3	Hour								
33033	Level 4	Hour								
33034	Level 5	Hour								

Table B.2.1.3.2-4 Supervisory Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Normal Business Hours

			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
34000	Level 1	Hour								
34001	Level 2	Hour								
34002	Level 3	Hour								
34003	Level 4	Hour								
34004	Level 5	Hour								

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
34010	Level 1	Hour								
34011	Level 2	Hour								
34012	Level 3	Hour								
34013	Level 4	Hour								
34014	Level 5	Hour								

Table B.2.1.3.2-4.b Supervisory Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Saturday and Sunday

			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
34020	Level 1	Hour								
34021	Level 2	Hour								
34022	Level 3	Hour								
34023	Level 4	Hour								
34024	Level 5	Hour								

Table B.2.1.3.2-4.c Supervisory Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Holidays

			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
	'	'	Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
34030	Level 1	Hour								
34031	Level 2	Hour								
34032	Level 3	Hour								
34033	Level 4	Hour								
34034	Level 5	Hour								

B.2.1.3.3 Knowledge and Content Development

Table B.2.1.3.3 Knowledge and Content Development Charge

Table	D.Z. 1.J.J KITOWICU	ge and content beve	iopincini ·	Charge						
			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
40000	Level 1	Hour								
40001	Level 2	Hour								
40002	Level 3	Hour								
40003	Level 4	Hour								

B.2.1.3.4 Project Implementation Support Table

B.2.1.3.4 Project Implementation Support

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
50000	Site Management	Hour								
50001	Program Management	Hour								
50002	Technology Management	Hour								
50003	Information Systems Security	Hour								
50004	Content and Knowledge Management	Hour								
50005	Contact/Case Management	Hour								
50006	Relationship Management	Hour								
50007	Customer Satisfaction Survey	Hour								

B.2.2 Project Management

Table B.2.2-1 Core Project Management Support (Monthly)

			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
60000	Level 1	Each Month								
60001	Level 2	Each Month								
60002	Level 3	Each Month								
60003	Level 4	Each Month								

Table B.2.2-2 Incremental Project Management Support (Monthly)

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
			11 1 / 2	11 3/4	11 37 0	11 // 0	11 77 10	I CHOU I	1 CHOU Z	1 CHOU 3
61000	Site Management	Hour								
61001	Program Management	Hour								
61002	Technology Management	Hour								
61003	Information Systems Security	Hour								
61004	Content and Knowledge Management	Hour								
61005	Contact/Case Management	Hour								
61006	Relationship Management	Hour								
61007	Customer Satisfaction Survey	Hour								

B.2.3 One-time Charges for Telecommunicated Services, Automated Services and Other Support Services

Table B.2.3-1 Service initiation Change Order Charges for Telecommunications Services

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
70000	Toll-Free Number	Each								
70001	Telecommunications Access Termination	Each T-1 Termination								
70002	Telecommunications Access Termination	Each T-3 Termination								

Table B.2.3-2 Service Initiation/Change Order Charges for Automated Services

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
71000	Interactive Voice Response (IVR) Service	Hour								
71001	Voice/Speech Recognition	Hour								
71002	Text-to-Speech	Hour								
71003	Fax-Back/ Fax-on-Demand	Hour								
71004	Voice Mail	Each Voice Mail Box								
71005	Automated Callback	Each								
71006	Web Callback	Each								
71007	Automated Outbound Dialing Campaign	Each								
71008	Automated Facsimile Service	Each								
71009	Automated E-Mail Delivery	Each								
71010	Hosted On Line Ordering	Hour								
71011	Hosted Web Form	Hour								
71012	Hosted FAQ Service	Each Database or Group of Databases								
71013	Hosted Web Chat	Hour								

Table B.2.3-3 Service Initiation/Change Order Charges – Other Support Services

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
72000	Language Translation Services	Each								
72001	Transcription Services	Each								
72002	Fulfillment Services	Hour								

B.2.4 Recurring Charges for Telecommunications Services, Automated Services and Other Support Services

Table B.2.4-1 Recurring Charges for Telecommunications Services

			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
	·		Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
80000	Toll Free Number	Each								
	Toll-Free Telephone									
80001	Service	Each Minute								

	Long-Distance Telephone					
80002	Service	Each Minute				1

Table B.2.4-2 Recurring Charges for Automated Services

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
81000	IVR Service	Each Minute								
81001	Voice/Speech Recognition	Each Minute								
81002	Text-to-Speech	Each Minute								
81003	Fax-Back/Fax-on-Demand	Each Successful Page								
81004	Voice Mail	Each Voice Mail Box per Month								
81005	Automated Callback	Each Completed Call								
81006	Web Callback	Each Completed Call								
81007	Automated Outbound Dialing Campaign	Each Successful Call								
81008	Automated Fax Delivery	Each Successful Delivery								
81009	Automated E-Mail Delivery	Each Successful Delivery								
81010	Hosted On-Line Ordering	Each Successful Transaction								
81011	Hosted Web Form	Each Form per Month								
81012	Hosted FAQ Service – Less than 200,000 page views per month	Each Database or Group of Databases per Month								
81012a	Hosted FAQ Service – Between 200K to 500K page views per month	Each Database or Group of Databases per Month								
81012b	Hosted FAQ Service – Between 500K to 1,000K page views per month	Each Database or Group of Databases per Month								
81012c	Hosted FAQ Service – Between 1,000K to 1,500K page views per month	Each Database or Group of Databases per Month								
81012d	Hosted FAQ Service – Over 1,500K page views per month	Each Database or Group of Databases per Month								
81013	Hosted Web Chat	Each per Month								

Table B.2.4-3 Recurring Charges for Other Support Services

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
82000	Transcription Service	Hour								
82001	Fulfillment Services	Hour								
82002	Language Translation Service - Telephone	Hour								
82003	Language Translation Service - Written	Word								

B.2.5 Attended Services (Dedicated Solution) - Information Specialist (IS) Hourly Rate

This is the fully burdened fixed unit rate to be paid for each IS hour worked. The hourly rate includes the blended labor costs of IS and relevant support personnel (e.g., quality monitoring personnel, trainers, human resources personnel, etc.) required to meet task requirements. Separate rates are provided for normal business hours, nights, Saturdays and Sundays, and federal holidays (see Section B.2.1.2.2 for definitions).

Table B.2.5.1-1 IS Hourly Rate – Normal Business Hours (English)

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
90001	Level 1	Hour								
90002	Level 2	Hour								
90003	Level 3	Hour								
90004	Level 4	Hour								
90005	Level 5	Hour								

Table B.2.5.1-2 IS Hourly Rate – Normal Business Hours (Bi-Lingual)

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
90011	Level 1	Hour								
90012	Level 2	Hour								
90013	Level 3	Hour								
90014	Level 4	Hour								
90015	Level 5	Hour								

Table B.2.5.2-1 Supervisory IS Hourly Rate – Normal Business Hours (English)

Table	D.Z.J.Z-1 Jupcivist	ory is riburry Raic -	IVOITII D	usincss	HOUIS (LI	igiisiij				
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
91001	Level 1	Hour								
91002	Level 2	Hour								
91003	Level 3	Hour								
91004	Level 4	Hour								
91005	Level 5	Hour								

Table B.2.5.2-2 Supervisory IS Hourly Rate – Normal Business Hours (Bi-Lingual)

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
91011	Level 1	Hour								
91012	Level 2	Hour								

91013	Level 3	Hour				
91014	Level 4	Hour				
91015	Level 5	Hour				

Table B.2.5.3-1 IS Hourly Rate - Nights (English)

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
92001	Level 1	Hour								
92002	Level 2	Hour								
90003	Level 3	Hour								
92004	Level 4	Hour								
92005	Level 5	Hour								

Table B.2.5.3-2 IS Hourly Rate - Nights (Bi-Lingual)

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
92011	Level 1	Hour								
92012	Level 2	Hour								
92013	Level 3	Hour								
92014	Level 4	Hour								
92015	Level 5	Hour								

Table B.2.5.4-1 Supervisory IS Hourly Rate Nights (English)

Tubici	D.Z.J.T-1 Jupcivis	ory is riburry reactivi	gnto (En	J11311)						
			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
93001	Level 1	Hour								
93002	Level 2	Hour								
93003	Level 3	Hour								
93004	Level 4	Hour								
93005	Level 5	Hour								

Table B.2.5.4-2 Supervisory IS Hourly Rate – Nights (Bi-Lingual)

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
93011	Level 1	Hour								
93012	Level 2	Hour								
93013	Level 3	Hour								
93014	Level 4	Hour								

94002

94003

Level 2

Level 3

93015	Level 5	Hour								
Table I	B.2.5.5-1 IS Hourly	Rate – Saturdays an	d Sundav	/s (Enali:	sh)					
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
94001	Level 1	Hour								

94004	Level 4	Hour			
94005	Level 5	Hour			

Table B.2.5.5-2 IS Hourly Rate – Saturdays and Sundays (Bi-Lingual)

Hour

Hour

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
94011	Level 1	Hour								
94012	Level 2	Hour								
94013	Level 3	Hour								
94014	Level 4	Hour								
94015	Level 5	Hour								

Table B.2.5.6-1 Supervisory IS Hourly Rate – Saturdays and Sundays (English)

		1	I D	01!		0	0			
			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
	·	· ·	Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
95001	Level 1	Hour								
75001	ECVCI I	Tiodi								
05000	Laval 2	Haum								
95002	Level 2	Hour								
95003	Level 3	Hour								
95004	Level 4	Hour								
			1							
95005	Level 5	Hour								
73003	Level 3	Houi								

Table B.2.5.6-2 Supervisory IS Hourly Rate – Saturdays and Sundays (Bi-Lingual)

Table	D.Z.J.U-Z Superviso	ory to ribuity reace -	Jatui uay.	s and Su	iluays (Di	Lingual				
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
95011	Level 1	Hour								
95012	Level 2	Hour								
95013	Level 3	Hour								
95014	Level 4	Hour								
95015	Level 5	Hour								

Table B.2.5.7-1 IS Hourly Rate – Holidays (English)

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
96001	Level 1	Hour								
96002	Level 2	Hour								
96003	Level 3	Hour								
96004	Level 4	Hour								
96005	Level 5	Hour								

Table B.2.5.7-2 IS Hourly Rate – Holidays (Bi-Lingual)

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
96011	Level 1	Hour								
96012	Level 2	Hour								
96013	Level 3	Hour								
96014	Level 4	Hour								
96015	Level 5	Hour								

Table B.2.5.8-1 Supervisory IS Hourly Rate – Holidays (English)

				(
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
			11 172	11 37 7	11 37 0	11 770	11 // 10	1 CHOC 1	1 CHOUZ	1 CHOC 5
97001	Level 1	Hour								
97002	Level 2	Hour								
97003	Level 3	Hour								
97004	Level 4	Hour								
97005	Level 5	Hour								

Table B.2.5.8-2 Supervisory IS Hourly Rate – Holidays (Bi-Lingual)

IUDICI	D.2.0.0 2 Oupoi vis	ory to riourly itale	Honauys	(Di Eiligi	auij					
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
97011	Level 1	Hour								
97012	Level 2	Hour								
97013	Level 3	Hour								
97014	Level 4	Hour								
97015	Level 5	Hour								

B.2.6 QA Personnel Multiplier

The QA Personnel Multiplier is a factor to be applied to the IS and IS Supervisor hourly rate to calculate the effective hourly rate for IS and IS Supervisors when task requirements require the Contractor to provide a solution with IS to QA personnel ratio that is above or below the average requirement. This multiplier is to be used only for dedicated solutions.

Table B.2.6 QA Personnel Multiplier

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
98001	Low	X Factor								
98002	Average	X Factor	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
98003	High	X Factor								

B.2.7 Shared or Non-Dedicated Telephone Inquiry Response Solution - Information Specialist (IS) Hourly Rate

The charges are based on the actual handle time required for Information Specialists to respond to telephone inquiries using prepared scripts/response provided by the Government. The fixed unit rate reflects the fully burdened unit rate for work performed by an IS plus any support personnel (e.g., program and project management, supervisors, quality monitoring personnel, trainers, etc.) and any recurring costs associated with facility, equipment, and maintenance required to support the IS in the performance of task requirements for a specific daily work volume commitment. For billing purposes, the actual handle time (including wrap-up time) of all calls during the month shall be totaled and rounded up to the nearest hour. The call handle time shall not include time spent waiting in queue or listening to automated messages.

Table B.2.7-1 IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – English (Normal Business Hours)

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
99001	4 Hours/Day	Each Hour								
99002	8 Hours/Day	Each Hour								
99003	12 Hours/Day	Each Hour								
99004	24 Hours/Day	Each Hour								
99005	48 Hours/Day	Each Hour								
99006	96 Hours/Day	Each Hour								
99007	192 Hours/Day	Each Hour								
99008	384 Hours/Day	Each Hour								
99009	576 Hours/Day	Each Hour								

Table B.2.7-1.a IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – English (Nights)

Tubic	D.2.1-1.a 13 110u11y	Nate (Shared or Nor	Dealeat	cu i cicpi	none inqu	illy itcopi	31136 3016	ILIOIT LIIQ	Jiisii (ivigi	113)
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
99011	4 Hours/Day	Each Hour								
99012	8 Hours/Day	Each Hour								
99013	12 Hours/Day	Each Hour								
99014	24 Hours/Day	Each Hour								
99015	48 Hours/Day	Each Hour								
99016	96 Hours/Day	Each Hour								

99017	192 Hours/Day	Each Hour				
99018	384 Hours/Day	Each Hour				
99019	576 Hours/Day	Each Hour				

Table B.2.7-1.b IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – English (Saturdays and Sundays)

Table	5.2.7-1.0 IS HOULTY Rate (Shared of Non-Dedical						i (Saturuay	s and Sund	ays)
			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
99021	4 Hours/Day	Each Hour								
	8 Hours/Day	Each Hour								
99022										
	_									
99023	12 Hours/Day	Each Hour								
99024	24 Hours/Day	Each Hour								
99025	48 Hours/Day	Each Hour								
99026	96 Hours/Day	Each Hour								
99027	192 Hours/Day	Each Hour								
99028	384 Hours/Day	Each Hour								
	-									
99029	576 Hours/Day	Each Hour								

Table B.2.7-1.c IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – English (Holidays)

Table	D.Z.7-1.6 13 110ui	ny ivale (Shared or i						ILIOH - LII	giisii (Holi	uays)
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
99031	4 Hours/Day	Each Hour					,			
99032	8 Hours/Day	Each Hour								
99033	12 Hours/Day	Each Hour								
99034	24 Hours/Day	Each Hour								
99035	48 Hours/Day	Each Hour								
99036	96 Hours/Day	Each Hour								
99037	192 Hours/Day	Each Hour								
99038	384 Hours/Day	Each Hour								
99039	576 Hours/Day	Each Hour								

Table B.2.7-2 IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – Bi-Lingual (Normal Business Hours)

	SILIT L TO HOURTY HUTO (OF	iai ca ci itoni b cancato			1100001100	00.00.	2. <u>2</u> 9 a.c	(343111033 11	
			Base	Option	Option	Option	Option			
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
99041	4 Hours/Day	Each Hour								
99042	8 Hours/Day	Each Hour								
99043	12 Hours/Day	Each Hour								
99044	24 Hours/Day	Each Hour								
99045	48 Hours/Day	Each Hour								

99046	96 Hours/Day	Each Hour				
99047	192 Hours/Day	Each Hour				
99048	384 Hours/Day	Each Hour				
99049	576 Hours/Day	Each Hour				

Table B.2.7-2.a IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – Bi-Lingual (Nights)

Table	5.2.1-2.a IS HOULTY	Rate (Shared or Nor	i-Deulcati	eu reiepi	none inqu	ali y ivespi	7113C 301U	ויוט – ווטווו	_iiiguai (iv	ignis)
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
99051	4 Hours/Day	Each Hour								
99052	8 Hours/Day	Each Hour								
99053	12 Hours/Day	Each Hour								
99054	24 Hours/Day	Each Hour								
99055	48 Hours/Day	Each Hour								
99056	96 Hours/Day	Each Hour								
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
99057	192 Hours/Day	Each Hour								
99058	384 Hours/Day	Each Hour								
99059	576 Hours/Day	Each Hour								

Table B.2.7-2.b IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – Bi-Lingual (Saturdays and Sundays)

	D.Z.7 Z.D 10 Houry No		Base	Option	Option	Option	Option			-
CLIN	Service Description	Unit of Issue	Period	Period 1	Period 2	Period 3	Period 4	Extended	Extended	Extended
			Yr 1 / 2	Yr 3 / 4	Yr 5 / 6	Yr 7 / 8	Yr 9 / 10	Period 1	Period 2	Period 3
99061	4 Hours/Day	Each Hour								
99062	8 Hours/Day	Each Hour								
99063	12 Hours/Day	Each Hour								
99064	24 Hours/Day	Each Hour								
99065	48 Hours/Day	Each Hour								
99066	96 Hours/Day	Each Hour								
99067	192 Hours/Day	Each Hour								
99068	384 Hours/Day	Each Hour								
99069	576 Hours/Day	Each Hour								

Table B.2.7-2.c IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – Bi-Lingual (Holidays)

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
99071	4 Hours/Day	Each Hour		11.07.1			11.77.10	T OHOU T	1 0110 4 2	1 01100 0
99072	8 Hours/Day	Each Hour								
99073	12 Hours/Day	Each Hour								

99074	24 Hours/Day	Each Hour				
99075	48 Hours/Day	Each Hour				
99076	96 Hours/Day	Each Hour				
99077	192 Hours/Day	Each Hour				
99078	384 Hours/Day	Each Hour				
99079	576 Hours/Day	Each Hour				

B.2.8 Shared or Non-Dedicated E-Mail Inquiry Response Solution - Information Specialist (IS) Hourly Rate

The charges are based on the actual handling time required for Information Specialists to respond to e-mail inquiries using prepared scripts/response provided by the Government. The fixed unit rate reflects the fully burdened unit rate for work performed by an IS plus any support personnel (e.g., program and project management, supervisors, quality monitoring personnel, trainers, etc.) and any recurring costs associated with facility, equipment, and maintenance required to support the IS in the performance of task requirements for a specific daily work volume commitment. For billing purposes, the actual time expended by ISs in responding to e-mail inquiries during the month in support of specific task requirements shall be totaled and rounded up to the nearest hour.

Table B.2.8-1 IS Hourly Rate (Shared or Non-Dedicated E-Mail Inquiry Response Solution) - English

Tubic	D.2.0 1 13 1100	arry Rute (Sharea or	Non Dealeat	cu L Iviui	i iiiqaii y	response	Joidiloit	, Liigiisi		
CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
99101	4 Hours/Day	Each Hour								
99102	8 Hours/Day	Each Hour								
99103	12 Hours/Day	Each Hour								
99104	24 Hours/Day	Each Hour								
99105	48 Hours/Day	Each Hour								
99106	96 Hours/Day	Each Hour								
99107	192 Hours/Day	Each Hour								
99108	384 Hours/Day	Each Hour								
99109	576 Hours/Day	Each Hour								

Table B.2.8-42 IS Hourly Rate (Shared or Non-Dedicated E-Mail Inquiry Response Solution) – Bi-Lingual

CLIN	Service Description	Unit of Issue	Base Period Yr 1 / 2	Option Period 1 Yr 3 / 4	Option Period 2 Yr 5 / 6	Option Period 3 Yr 7 / 8	Option Period 4 Yr 9 / 10	Extended Period 1	Extended Period 2	Extended Period 3
99201	4 Hours/Day	Each Hour								
99202	8 Hours/Day	Each Hour								
99203	12 Hours/Day	Each Hour								
99204	24 Hours/Day	Each Hour								
99205	48 Hours/Day	Each Hour								
99206	96 Hours/Day	Each Hour								

99207	192 Hours/Day	Each Hour				
99208	384 Hours/Day	Each Hour				
99209	576 Hours/Day	Each Hour				

1 <u>SECTION C</u>

PERFORMANCE WORK STATEMENT (PWS)

C.1 OVERVIEW

C.1.1 Background

The General Services Administration (GSA) is responsible for implementing the USA Services E-Gov initiative. The USA Services initiative is one of the current Administration's 24 E-Gov initiatives designed to improve the delivery of Government information and services to the American public. In support of the initiative, GSA awarded indefinite delivery, indefinite quantity contracts to five different awardees in July 2004. These contracts are managed as the FirstContact program. As such, they are commonly referred to as the FirstContact contracts. The objective of the FirstContact program was to provide a qualified source of suppliers of contact center and related services to enable Federal agencies to obtain support to serve their customers on a timely and cost effective basis. The performance period of these contracts was one base year with four one year options. The total value of task orders that can be issued under these contracts was set at \$150 million. Although the expiration of the last option year is not scheduled until July 2009, GSA expects to exhaust the \$150 million contract ceiling by September 2007 or earlier. The purpose of this procurement action is to provide a qualified source of suppliers of contact center and related services to enable current FirstContact customer agencies to recompete their requirements with the new suppliers at or before the end of their current task orders, and to meet new agency requirements. However, the Government makes no commitment that any of the existing customers of the FirstContact contracts will consider the use of the new contracts awarded under this procurement prior to the expiration of their task orders under the FirstContact contracts.

C.1.2 Scope of Work

This Statement of Work (SOW) provides a baseline of both general and specific requirements that the Contractor will be expected to accomplish to meet the needs of the Government.

The Contractor shall provide a wide range of automated and manual customer support services to respond to inquiries about Federal Government programs, policies, information sources and agencies from the general public, Congressional offices, business and professional communities, academia, Government offices, and electronic and print media. The Contractor shall furnish the necessary facilities, personnel, equipment, supplies, and services, as required, to meet the requirements of the Government. In addition to providing customer support services, the Contractor shall perform all technical and management functions, as described in this SOW, to plan, design, implement, operate, and manage the contact center solutions. The Contractor shall also provide any special project support needed to analyze, plan, design, implement, operate and manage special customer support services that may be needed to meet the diverse needs of the Government.

The geographic scope of this solicitation encompasses primarily contact centers that will be located in the United States. Where appropriate and on a task order-by-task order basis, the Government may allow centers to be located outside of the United States. The Contractor shall respond to inquiries and fulfillment requests originated from within the United States and from foreign countries.

The term "multi-channel contact center," as used in this solicitation, refers to a customer contact center that performs all functions associated with receiving and responding to inquiries, and providing

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50 information and services through the use of various communications media, including telephones, 51 telecommunications devices for the deaf (TDD/TTY), e-mail, postal mail, facsimile, the Internet, and 52 other media as appropriate. 53 54 55 C.1.3 Objectives 56 Through the services offered under this contract, the Government expects to realize the following 57 objectives: 58 59 o Position the Government's public information services on par with or exceeding private industry 60 standards by providing customers with easily accessible, accurate, timely, and professional 61 responses to their inquiries via their preferred method of communication. 62 63 o Provide capability to respond quickly to provide fully managed multi-channel inquiry response 64 and management solutions to meet the needs of Federal agencies and programs in emergency and 65 crisis situations. 66 67 o Provide increased capability to measure and control the delivery of information services to meet the evolving needs of citizens. 68 69 70 o Provide solutions that comply with federal information systems security requirements. 71 72 o Gain and sustain access to commercial off-the-shelf, state-of-the-art technology that is secure and 73 scalable to meet current and future requirements. 74 75 o Control information dissemination costs. 76 77 o Promote job opportunities for individuals who are blind or with severe disability. 78 79 80 **C.2** PROGRAM REQUIREMENTS 81 82 **C.2.1** General Requirements 83 84 C.2.1.1 **Contact Center Location** 85

Unless approved by the Government, all Contractor-provided, operated, and managed contact centers shall be located within the United States. For location-specific applications where it is not practical or economical to locate the center(s) within the United States, the Government may allow the Contractor to deviate from such requirement. Any such deviation must be approved by the Contracting Officer in advance of such placement.

91 C.2.1.2 Hours of Operation

Due to the diversity of agency requirements, the Contractor must have the capability to provide attended (live) service on a 24 hours a day, 7 days a week (24 x 7) basis. The Contractor shall provide separate rates for Normal Business Hours, Nights, Saturdays and Sundays, and Holidays, as defined below for

95 attended services.

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Normal Business Hours are defined as the time period between 7:00 am to 9:00 pm local time, Monday through Friday, except designated federal holidays.

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Nights are defined as the time period between 12:01 am and 7:00 am local time on Monday, between 9:00 pm and 7:00 am local time, Monday through Friday, and between 9:00 pm Friday and 12:01 am local time Saturday, except on designated federal holidays.

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Saturdays and Sundays are defined as the time period between 12:01 am Saturday and 12:01 am Sunday, and between 12:01 am Sunday and 12:01 am Monday local time respectively.

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Holiday hours are defined as the 24 hour period beginning at 12:00 midnight on the day of the holiday.

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Specific operating hours, including coverage for normal business hours, nights, Saturdays and Sundays, and holidays, and emergency notification requirements, if any, will be determined on a case-by-case basis and be included in task orders issued by the Government.

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An automated service (e.g., Interactive Voice Response [IVR] or equivalent) shall be used to provide unattended service 24 hours a day, seven days a week. The Contractor shall provide options that allow the Government to select the automated service either from the Contractor or from any service providers under the General Services Administration Federal Government Long Distance Carrier or other Government contracts (e.g. Verizon, Sprint, Owest, AT&T), or both.

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C.2.1.3 Place of Performance

All inquiry response work shall be performed at contractor managed facilities within the United States unless specifically authorized by the Government.

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123 **C.2.1.4 Work Types**

Due to the diversity of agency requirements, the Contractor must have the capability to support a wide range of customer support work types for all communications channels (e.g. telephone, e-mail, facsimile, postal mail, web chat), including but not limited to the types of inquiries listed below. Specific work types will be identified in task orders issued by the Government.

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- o Referrals
- o General information inquiries
- o Inquiries on specific programs, applications, and services
- o Fulfillment requests
- o Order intakes
- o Congressional inquiries
- o Emergency inquiries
- O Contingency-related inquiries (e.g., inquiries resulting from the activation of an agency's

- 137 Contingency Of Operations Plan [COOP]) 138 Service inquiries 139 o Scheduling of appointments 140 o Complaint inquiries 141 **Public comments** 142 o Customer surveys/feedback 143 Transcription services 144 Information delivery/collection via outbound service
- o Eligibility screening
 - o Inquiries on news and current events

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C.2.1.5 Language Support

The Contractor must have the capability to support a wide range of languages in responding to live inquiries under various workload conditions, including but not limited to the languages listed below. Specific languages and volumes will be identified in task orders issued by the Government. The Contractor may provide foreign language support via "foreign language line" instead of on-site support if such is the most effective solution.

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- English
- o Spanish
- o Mandarin
- o Cantonese
- o French
- o German
- o Japanese
- o Korean
- 163 o Vietnamese

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C.2.1.6 Rapid Ramp-Up/Ramp-Down

The Contractor must have the capability to ramp-up contact center operation to fully operational status within forty-eight (48) hours or sooner after task order award in response to crisis and emergency situations. This means that the contractor must have the facility, technology, and staffing in place to start taking calls within 48 hours of task award. The 48 hour ramp-up requirement is for tasks requiring support of up to 250 seats. This includes the provision of required equipment and facilities, trained staff, telecommunications and automated response solutions, possible round-the-clock attended coverage, and management reports on inquiry activities. The Contractor must ramp-down to the desired staffing level within 24 hours of notification by the Government or within the minimum notification period for terminating employment set forth in employment law, whichever is longer.

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176 C.2.1.7 Dedicated and Shared or Non-Dedicated Service Solutions

The Contractor must have the capability to provide dedicated and shared or non-dedicated service solutions in response to specific Government requirements. A dedicate solution is defined as a solution that utilizes work space, equipment, and staffing which are dedicated to the project. A shared or non-dedicated solution is defined as a solution that utilizes work space, equipment, and staffing which are shared with other projects managed by the contractor or its subcontractors. The Contractor is required to provide dedicated solutions to support all project complexity and skill levels within the timeframe specified in individual task orders. The Contractor is required to provide shared or non-dedicated service solutions to support less complex projects that require short ramp-up time and lower skill levels.

The Contractor shall provide shared or non-dedicated service solutions to respond to telephone and e-mail inquiries. At a minimum, shared or non-dedicated telephone inquiry response solutions shall respond to seventy (70) percent of all calls within twenty (20) seconds after the calls are offered to the Information Specialists at an abandonment rate of three (3) percent or less. Shared or non-dedicated e-mail inquiry response solutions shall respond to eighty (80) percent of all e-mail inquiries within two (2) business days of receipt.

C.2.2 Sample Workflow

The following sample workflow descriptions are provided for illustrative purposes only. Actual workflow will be described in individual task orders. The Contractor shall have the capability to accommodate workflow requirements of varying complexity. The Contractor shall develop the optimum workflow based on requirements and business rules as identified in individual task order requirements and industry best practices, as applicable. The Government reserves the right to change the workflow requirements at any time after task order issuance to accommodate changes in program requirements on an as-needed basis.

C.2.2.1 Sample Call Flow

A sample call flow process is provided below.

The caller dials a direct-dial or toll-free telephone number terminating at or routed to the Contractor provided contact center for Government information and assistance.

The call is delivered to an automated service (e.g., IVR or equivalent) furnished either by the Contractor or the Government. The automated service provides a menu of services that access answers to frequently asked questions and automated facsimile services. The automated service may also provide an option for the caller to be transferred automatically to another Government contact center for assistance. If the caller is unable to satisfy his or her inquiry via the self-service options offered by the automated service, or prefers to talk to a live Information Specialist (IS), the caller can, during normal business hours, select the option to speak to a live IS for assistance. If the call is received after normal business hours, the caller is informed of the business hours and asked to call back during those hours on the next business day, or to leave a message for a return call. If the call is of an emergency nature, the caller is provided with directions to call a designated telephone number for assistance.

After the caller is routed to an IS, the IS responds to the caller's initial request and any other additional requests the caller makes. The IS retrieves data from a knowledge base to respond to customer requests and/or records the required information needed to complete any fulfillment actions. The Contractor shall provide an inquiry tracking tool whereby the IS shall have the capability to initiate actions or check the

status of previous actions initiated on behalf of the caller. When possible, all systems work shall be performed while the IS is engaged with the caller during the phone call.

The IS either completes the call or routes the call to more experienced Contractor personnel for further assistance. If information requested is beyond the scope of Contractor's agreed to level of service as specified in the task order, the IS refers the caller to the appropriate Government agency personnel for completion. Calls requiring transfer may be accomplished using blind or attended transfer as specified by the agency, or may be referred to the appropriate agency via e-mail or facsimile rather than via telephone transfer. In cases where the caller indicates an emergency situation, however, the Contractor personnel shall stay on the line with the caller (attended transfer) until a live person is reached. The caller has the option of making multiple requests during any one phone call. At call termination, the IS will perform after-call wrap-up procedures and logs necessary action items and call information.

The nature of the caller's request may require that information be sent to the caller. If the requested information is available and can be sent by facsimile, the IS shall complete the facsimile transmission. If printed information is requested, the IS will record the required information needed to complete the fulfillment action. The fulfillment action may be completed by the Contractor or by the Government.

The IS records caller/case profile information for the contact/case management system.

A sample description of a normal e-mail workflow process is provided below.

Complex requests may require one or more follow up calls by the IS. The IS shall have the capability to dispatch information to a caller through mail, e-mail, and facsimile. The Contractor-provided inquiry tracking tool shall monitor all requests that require follow up and automatically assign those requests to an IS for further action. Where follow up telephone contact is required, the system shall prompt the assigned IS to make such contact. The IS shall both resolve the issue and initiate the customer callback, or escalate the issue internally for resolution.

C.2.2.2 E-Mail Workflow (Normal)

The inquirer visits a Government web site (e.g., USA.gov's website @ www.usa.gov). If the inquirer cannot find what he or she is looking for, the web site provides alternatives for further assistance. One of the alternatives is a toll-free phone number to call for assistance. Another alternative is to access an automated tool or service from the website that provides answers to frequently asked questions (FAQs) (see Section C.3.1.11). If further assistance is needed, the inquirer can access an e-mail form on the website to send an inquiry on the desired subject. A variation of the web-based e-mail form alternative may be to allow the inquirer to send an e-mail message directly to a published Government e-mail

address.

If the inquirer elects to use the e-mail form alternative, an e-mail form at the website will provide helpful hints and frequently asked topics to guide the inquirer through the process of submitting the request and help focus the nature of the inquiry. The request is then forwarded to the contractor-provided contact center for response.

Upon receipt of the inquiry at the center, the Contractor-provided e-mail distribution and management system will time-stamp, sort, categorize, and prioritize the inquiry based on agency specified business rules, and assign a tracking number that will be used throughout the process to track the status of the inquiry. Upon receipt of the inquiry by the contractor's e-mail system, the Contractor may be asked to immediately forward a copy of the original inquiry to a Government-furnished e-mail address for informational purposes. The system will capture all relevant information about the inquiry and present it

for use by the IS during the response process. As a first step in the response process, a Government approved auto-response will be sent immediately to the e-mail address provided by the inquirer to acknowledge receipt, provide the tracking number for any future communication, and provide an estimated response time. Over time, as the Contractor develops preformatted responses to frequently asked subjects, the Contractor may include preformatted responses as part of the auto-response.

After the initial acknowledgment, the inquiry will be routed to an IS with the appropriate skills for responding to the inquiry. Depending on the nature of the inquiry, the IS will either respond directly or will refer the inquiry to the appropriate contractor or agency personnel for direct response. If the IS decides to refer the inquiry to an agency (or agencies) for response, the IS will send a notice to inform the inquirer of this decision and to provide relevant information on the responding office(s), the expected response time as determined by the agency (if applicable), and contact information. The status log for this inquiry will then be updated. In either case, the Government may require the Contractor to provide a copy of the response to a Government-furnished e-mail address for agency monitoring and quality control purposes.

Upon completion of the response to an e-mail message forwarded by the Contractor, the responding agency may send a completion notice to the Contractor contact center for status update. The completion notice may be in the form of a batch listing containing all referred e-mails handled by that agency organized by tracking number and including a date and time, or a cc or bcc copy of each e-mail response, which then can be used by the Contractor to close out the case. With consensus of all parties, an alternative method of updating the status can be used. The Contractor shall work with the agency to develop a method that meets the needs of both parties. If the responding agency elects, as part of its business rules, not to send a completion notice to the Contractor, the inquiry will be considered closed and no further action will be required.

C.2.2.2.1 E-Mail Workflow (Misdirected)

The Contractor may receive e-mail inquiries from other agency(ies) who have determined that they are not the appropriate agent for responding to these inquiries. One of the goals of the USA Services initiative is to reroute these misdirected inquiries to the appropriate agencies for direct response. These misdirected inquiries may be routed to the Contractor via a central forwarding mail box established by each agency or from one or more individual mail boxes. Once received, the inquiries are processed in a manner similar to that described in Section C.2.2.2. The Contractor shall work with the agencies to develop the appropriate protocols and procedures for responding to and managing the disposition status of the misdirected inquiries.

C.2.2.2.2 E-Mail Response Options

E-mail response options may vary from one agency to another. When responding to e-mail inquiries, the IS shall analyze the message content to determine the nature of each inquiry. The IS shall evaluate the available response options to determine which is the most appropriate for the inquiry and, if necessary, query the appropriate database(s) for relevant information to be included in the response, and then record aspects of the inquiry in a contact/case management status log. For example:

No response - If the inquiry does not require a response (some examples are pranks, spam, duplicate messages, and incomprehensible submissions), the IS records the type of message in the status log and notes that no further action is required.

Comment or opinion - If the inquiry is a comment or opinion not requiring a customized response, the IS forwards the inquiry to the appropriate agency and sends an acknowledgment to the inquirer thanking them for the input, and identifying agency to which it has been transmitted. The IS records the topic of

the question using specific categories provided through the system for in reporting such data to agencies and updates the status log for this inquiry.

General inquiry easily answered - If the inquiry is general in nature and can be answered immediately, the IS produces the response using preformatted responses. The IS records the topic of the question using specific categories provided through the system for use in reporting to agencies and updates the status log for this inquiry.

Inquiry to be forwarded to a single agency - If the inquiry requires a customized response and must be forwarded to an agency, the IS forwards the inquiry to the appropriate agency. The IS also sends a response to inform the inquirer of this action as to what type of response time to expect, and how to follow up with the responding agency. The IS records the topic of the question using specific categories provided through the system for reporting such data to agencies and updates the status log for this inquiry. Both the forwarding and response action are accomplished simultaneously with one automated action.

Inquiry to be forwarded to multiple agencies - If the inquiry requires a customized response and must be forwarded to more than one agency to receive a complete reply, the IS prompts the system to assign sublevel tracking numbers and forwards the inquiry to the appropriate agencies, notifying them which other agencies are also receiving the message. The IS also sends a response to inform the inquirer of this action, what type of response time to expect, and how to follow up with the responding agencies. The IS records the topic of the question(s) using specific categories provided through the system for use in reporting to agencies and updates the status log for this inquiry. Both the forwarding and response action are accomplished simultaneously with one automated action.

Inquiry to be referred to agency without e-mail - If the inquiry requires a customized response and must be forwarded to an agency, but there is no established contact at that agency, the IS provides the inquirer with an alternative means of communicating with the agency, such as the agency website URL, call center number, or mailing address. The IS records the need for follow up action to establish an appropriate contact at that agency and updates the status log for this inquiry.

Additional information required - If the IS determines that additional information from the inquirer is necessary to answer the question or to determine who can answer the question, the IS may use a preformatted or customized response to make a specific request for the additional information necessary to reply to the e-mail or to suggest that the inquirer call a toll-free number at a specified contact center to discuss the question. The IS records the topic of the question using specific categories provided through the system for use in reporting to agencies and updates the status log for this e-mail.

Referral to law enforcement for action - If the IS determines that the message is of a suspicious nature or contains a specific threat against life or property as defined by the agency, the Contractor shall escalate the matter to the appropriate authority. The Contractor will use established escalation procedures to ensure that the message is passed on to the appropriate law enforcement authorities within a pre-defined time interval.

Removal of extraneous data – To the extent practicable, the Contractor shall employ automated means to remove the extraneous routing and other data from the response (rather than relying on manual agent action).

Undeliverable responses - The Contractor shall track all undeliverable e-mail responses addressed to inquirers and perform analyses, as required, to determine the causes of non-delivery. If the IS determines that non-delivery was caused by an erroneous e-mail address, the Contractor shall make a reasonable

attempt to identify and correct the error and to attempt redelivery of the message. The Contractor shall record any non-delivery in the case management database.

C.2.2.3 Facsimile Inquiry Workflow

A sample workflow process for facsimile inquiries is provided below.

The inquirer sends an inquiry via facsimile to a direct-dial or toll-free telephone number for Government information and assistance. The Government may direct the contractor to respond to facsimile inquiries via telephone, facsimile, e-mail, or other communications media, whichever is the most efficient and satisfies the inquirer. The Contractor-provided system receives the facsimile inquiry and, if necessary, converts and stores the facsimile inquiry in a commonly used format and distributes the inquiry to a qualified IS for response. The Contractor shall be responsible for tracking the status of facsimile inquiries in a manner similar to e-mail inquiries. Facsimile inquiries referred to other federal agencies for direct response shall be transmitted as e-mail attachments. The Contractor shall note in the e-mail that the original inquiry was received as a fax document. Responses to facsimile inquiries may be via telephone, facsimile, e-mail, or other communications media, whichever is the most efficient and satisfies the inquirer. The Contractor shall retain a copy of all responses for recordkeeping.

C.2.2.4 Postal Mail Inquiry Workflow

A sample workflow process for postal mail inquiries is provided below.

The inquirer sends an inquiry via postal mail to a specified postal address maintained by the Contractor or the Government. If the address is maintained by the Government, the mail will be forwarded to the Contractor using one or more of the following methods:

o forwarded by postal mail and/or courier service by the Government to an address maintained by the Contractor;

o picked up by the Contractor from a Government location; or

o converted documents forwarded to the Contractor by electronic means (e.g. e-mail, facsimile).

The Contractor receives the postal mail, assigns time and date of receipt to each inquiry, and, if required, converts each inquiry, including associated envelope/packaging, to a commonly used electronic format to facilitate routing, response, and records management. The inquiry is then routed to a qualified IS for response. The Contractor shall be responsible for tracking the status of postal mail inquiries in a manner similar to facsimile and e-mail inquiries. Postal mail inquiries referred to other federal agencies for direct response shall be scanned and transmitted as e-mail attachments. The Contractor shall note in the e-mail that the original inquiry was received via postal mail. Responses to postal mail inquiries may be via telephone, facsimile, e-mail, postal mail, or other communications media, whichever is the most efficient and satisfies the inquirer. The Contractor shall retain a copy of the original inquiries and all responses for recordkeeping. Storage and disposition of originals and responses shall be in accordance with the requirements contained in individual task orders.

419 C.2.3 Response Protocols

The Contractor shall respond to information requests generally through the use of one or a combination of the following methods:

Automated Response – The Contractor shall use automated tools (e.g., IVR, Fax-on-Demand) to provide unattended service responded to frequently asked questions.

Telephone response - When responding to inquiries, the Contractor shall analyze the inquiry, assess the appropriate response modes, gather available information from all pertinent sources, analyze and confirm the accuracy of the information, and provide the requested information and/or assistance in the manner most efficient to satisfy the inquirer's needs. For inquiries involving more complex subjects that may require further research off line, the Contractor shall conduct the research in accordance with agency-provided guidelines and provide the appropriate information within the timeframe specified by the Government. Whenever possible, immediate responses shall be given.

TDD/TTY response – The Contractor shall ensure that TDD/TTY users are offered similar levels of service similar to that received by telephone users supported by this contract.

Facsimile response - In certain cases, the Contractor may be requested to provide to the inquirer written documentation that supports the oral response given over the telephone and/or conveys the information requested. When requested and where possible, the Contractor shall send a copy of the document to the caller via facsimile within the timeframe specified by the Government. The Contractor shall employ automated means of sending the requested documents. The Contractor shall use instructions provided by the Government for handling facsimile responses.

Electronic response – The Contractor shall respond to requests received through electronic media (e.g., e-mail, Internet websites, facsimile) within the timeframe specified by the Government. These responses may require the Contractor to provide copies of any information source documents as attachments to the electronic response. If the source documents are not available in electronic format, the Contractor may be required to convert the documents to a suitable format to facilitate electronic transmission and records management. The Contractor shall retain a copy of the electronic inquiry and response for recordkeeping for a period specified by the Government.

Written (postal mail) response – The Contractor shall respond to written requests accurately and completely within the timeframe specified by the Government. These responses may require the Contractor to provide copies of any information source documents as attachments to the written response. The Contractor may be required to convert the documents to a suitable format to facilitate routing, response and records management. Response to written inquiries may be provided by telephone, e-mail, facsimile, postal mail, or other communications media, whichever is more efficient and satisfies the inquirer. The Contractor shall retain a copy of the written inquiry and response for record-keeping for a period specified by the Government. For written inquiries where the Contractor is unable to decipher the content of the request, Contractor shall, if possible, contact the customer by telephone or mail and attempt to resolve the inquiry in the most expeditious fashion.

Form letter response – The Contractor may develop and prepare form letters for dissemination in response to telephone, electronic, and written inquiries. The Government shall approve all such form letters before they are used to fulfill information requests.

Interim response - In cases where the Contractor cannot provide an immediate response because further research is necessary, the Contractor shall provide the requestor with an interim response within the timeframe specified by the Government. The interim response shall indicate when the inquirer will receive a complete response.

Coordinated response - Any inquiry, especially one involving legal matters, policy interpretation, and/or a highly technical response that cannot be answered readily from approved materials in the knowledge

database shall be referred to the appropriate authority for direct response. Telephone inquiries of such nature shall be forwarded immediately after identification. Electronic, facsimile and written inquiries identified as requiring special support from appropriate authority shall be forwarded in the timeframe specified by the Government, but no later than two (2) business days after receipt.

Referral – Some inquiries may be misdirected and/or not within the scope of the specific program mission. The Contractor shall differentiate these inquiries and re-direct and refer inquiries that are misdirected and/or not within the scope of the programs, to individuals or organizations that may be able to provide answers to questions or otherwise offer assistance. When appropriate the Government will provide the Contractor with a baseline referral list of such individuals and organizations on a program-by-program basis. The Contractor shall maintain, expand, and update this list throughout the contract performance period to ensure it is current and complete.

C.3 SERVICES TO BE PROVIDED

The Contractor shall provide all of the services identified in this SOW. Specific service requirements will be identified on a case-by-case basis and be included in individual Task Orders to be issued by the Government. The Contractor shall ensure that services delivered employ technology that is effective and scalable to meet the evolving needs of the Government and adhere to business processes that conform to industry best practices.

The Government reserves the right to add additional services required to meet the evolving needs of the citizens and agency programs at any time during the life of the contract. Any additions will be subject to written mutual agreement between the Government and Contractor.

C.3.1 Automated Services

The Contractor shall provide automated services to enable the Government to deliver unattended service 24 hours a day, 7 days a week (24 x 7). The Contractor is responsible for the provision, maintenance, design, implementation, operation, and management of these services.

C.3.1.1 Automated Voice Response Services

Automated voice response services are intended to provide unattended service to telephone callers on a 24 x 7 basis. These services include the traditional interactive voice response (IVR) service, which uses the telephone touch-tone pad or simple voice commands to access pre-recorded information. They also include advanced services that make use of speech recognition and text-to-speech technologies to enhance efficiency and customer service. At a minimum, the Contractor-provided automated voice response services shall support the following languages:

- Cantonese
- 515 o English
- 516 o French
- 517 o German
- 518 o Japanese
- 519 o Korean

- 520 o Mandarin
- 521 o Spanish
- 522 o Vietnamese

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Specific language support requirements will be identified in task orders issued by the Government.

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The Contractor shall provide qualified personnel to develop and regularly maintain call flow and messages for automated voice response services in keeping with the current informational needs of the callers. The Contractor shall ensure timely update of all messages in accordance with the turn-around timeframes established by the Government. Unless otherwise directed by the Government in individual task orders, Contractor shall post changes within 24 hours of receipt for all non-emergency information and within 2 hours of receipt for emergency notices. Support for emergency postings and updates is required on a 24 hour a day, 7 days a week basis. Updates of the script and/or the "call flow" may be made on demand and on an "as required" basis.

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The Government may elect to furnish its own network-based automated voice response services, obtained from the Federal Government Long Distance Carrier or other contracts, as part of the toll-free telephone service requirement if the use of such service is determined to be in the best interest of the Government. The Government reserves the right to furnish these services at the outset of a project or to implement these services to augment or replace the contractor-provided services at any time during the effective contract period. In the event the Government elects to furnish its own automated voice response service, the Contractor shall provide qualified personnel to develop and maintain call flow and scripts for the Government furnished services as specified in Section C.3.5.6.a.

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C.3.1.1 .1 Interactive Voice Response (IVR) Service

The IVR service shall accommodate callers having touch-tone and rotary telephones/dial pulse telephones who seek information via the unattended mode. All IVR messages shall be recorded using broadcast standard recording techniques, and any changes to the script will be made using the same voice pattern, at the same pitch, speed and tone of delivery, and at the same volume as the initial recordings. The IVR service shall provide options to allow the caller to return to the main menu and select live operator assistance during the normal business hours. The IVR solution shall provide access to information via Fax-Back/Fax-on-demand services, and other automated services, when such services are ordered and implemented as part of the IVR solution.

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C.3.1.1.2 Voice/Speech Recognition Service

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The Contractor shall provide voice recognition service to augment and/or replace the traditional IVR service. The service shall provide access to information via other automated services and/or live assistance as appropriate. The service shall provide an intuitive, convenient, customer-friendly, and naturally-sounding speech interface that serves callers quickly, efficiently, accurately, and consistently. The service shall automatically adapt to callers' language, speech patterns, accents, and noise environment to ensure accurate and responsive service. The service shall incorporate self-learning technology to enable recognition and response accuracy to continually improve as the service adapts to

technology to enable recognition and response accuracy to continually improve as the service adapts to caller usage of the service. The service shall support VoiceXML and other industry standards for voicedriven applications.

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C.3.1.1.3 Text-to-Speech Service

The Contractor shall provide text-to-speech service to augment and/or replace the traditional IVR service.

The service shall convert textual information into speech that closely resembles natural voice over any

telephone. The service shall provide an intuitive, convenient, customer friendly, and natural-sounding speech interface that serves callers quickly, efficiently, accurately, and consistently. The service shall be able to distinguish between homophones (words with identical spellings but different pronunciations) and understand word context as they appear in a sentence. The service shall provide word, phoneme, and The service shall provide the capability for authorized personnel to update dictionaries remotely to improve accuracy. The caller shall not experience any noticeable latency during the processing of long text strings. The service shall support speech synthesis mark-up language (SSML) and other industry standards for text-to-speech applications.

C.3.1.2 Facsimile Services

The Contractor shall respond to requests for information via automated facsimile services, including Automatic Fax-Back and Fax-On-Demand services. Automatic Fax-Back allows a caller to select a document from a list via a self-service menu and direct the document to be sent to a specified fax number. Fax-On-Demand allows an Information Specialist to automatically fax a document requested by the caller to a specified fax number. Specific documents to be provided via facsimile services will be identified in individual task orders.

C.3.1.2.1 Automatic Fax-Back Service

The Contractor shall respond to requests for information via automated Fax-Back immediately upon receipt of such requests. The Contractor shall integrate the automated Fax-Back service with its IVR and/or other automated voice response services to enable the caller to select the requested information, and to enter a fax number for receiving the information without the assistance of an Information Specialist. The selection menu for the automated Fax-Back service shall allow the caller to return to the main menu and/or to allow the caller to access the Information Specialist for assistance.

C.3.1.2.2 Fax-On-Demand Service

When it is more efficient and cost effective to respond to inquiries (telephone, letter, e-mail, etc.) by facsimile, the Contractor shall deliver the requested information via Fax-on-Demand service immediately upon receipt of such requests. The Fax-On-Demand service shall allow the Information Specialist and/or the caller to select the requested information and either request the information be sent immediately via facsimile to the calling number during the same telephone session, or have the information sent to a different fax number entered by the IS or caller. The Fax-on-Demand service shall be integrated with the IVR and/or other automated service to enable the caller to access other services.

C.3.1.3 Voice Mail Service

The Contractor shall provide voice mail service to enable callers to leave suggestions, comments, callback information, and messages on specific subjects. The voice mail service shall be accessible from the IVR and/or other automated services and provide sufficient capacity to handle anticipated call volume and call duration as defined on individual Task Orders. The Contractor shall retrieve and act on the recorded information in accordance with task order requirements. When required, the Contractor shall provide a taped copy of voice mail messages recorded. The Contractor shall maintain a copy of the voice mail messages for at least 90 days from the record date.

C.3.1.4 Automated Callback (Telephone)

The Contractor shall provide an automated callback service that allows a telephone caller the option of leaving callback information for Contractor call-back at a later time, instead of waiting in queue for an available Information Specialist. The service shall prompt the caller to provide the callback information and provide an estimated callback time to the caller. The service shall automatically contact the caller at

the estimated callback time, and connect the caller to an available Information Specialist for assistance. If the callback encounters a busy or no-answer condition, the service shall repeat the callback for up to 3 additional attempts within an appropriate time interval (as specified in individual task orders) before aborting. If the callback encounters a voicemail or answering service, the service shall leave a brief message indicating the purpose and time of the callback and instructions for calling back, if any, as provided by the Government. For billing purposes, each group of six callback attempts encountering a busy and/or no-answer condition will be counted as a completed call.

C.3.1.5 Web Callback

The Contractor shall provide a fully managed hosted web callback service to allow a visitor to a Government website to access the service and leave callback information for the Contractor to call back at a later time. The service shall prompt the caller to provide the callback information, including the subject of the inquiry, and provide an estimated callback time to the caller. The service shall automatically contact the caller at the estimated callback time and connect the caller to an available Information Specialist for assistance. If the callback encounters a busy or no-answer condition, the service shall repeat the call back for up to 3 additional attempts within an appropriate time interval as specified in individual task orders before aborting. If the callback encounters a voice mail or answering service, the service shall leave a brief message indicating the purpose and time of the callback and instructions for calling back, if any, as provided by the Government. For billing purposes, each group of six callback attempts encountering a busy and/or no-answer condition will be counted as a completed call.

C.3.1.6 Automated Outbound Dialing Campaign

The Contractor shall provide a fully-automated solution to deliver a pre-recorded message furnished or specified by the Government to individuals/organizations on a listing provided by the Government. The service shall have the capacity to accommodate a message length of up to 90 seconds. The service shall automatically call the individuals at specified phone numbers for up to six attempts at time periods and intervals specified by the Government. Upon answer by an individual, voice-mail, or telephone answering equipment, the service shall deliver a pre-recorded message specified by the Government. If the service encounters a busy or no-answer condition, the service shall repeat the calling for up to 5 additional attempts before aborting. For billing purposes, each group of six (6) dialing attempts encountering a busy and/or no-answer condition will be counted as one (1) completed call.

C.3.1.7 Automated Fax Delivery

The Contractor shall provide a fully automated solution to transmit documents, via facsimile, to individuals/organizations on a listing provided by the Government. The service shall have the capacity to accommodate documents of up to 3 pages in length, excluding the cover page, for each transmission. The service shall automatically call the individuals at specified telephone numbers for up to six attempts at time periods and intervals specified by the Government. Upon answer by functional facsimile equipment, the service shall transmit the document specified by the Government. If the service encounters a busy or no-answer condition, the service shall redial the call for up to 5 additional attempts before aborting. For billing purposes, each group of six (6) callback attempts encountering a busy and/or no-answer condition will be counted as one (1) completed call.

C.3.1.8 Automated E-Mail Delivery

The Contractor shall provide a fully automated solution to transmit e-mail messages via the Internet to individuals/organizations on a listing provided by the Government. The service shall have the capacity to accommodate text messages of up to 15K bytes in length for each e-mail message. The contractor shall identify all unsuccessful transmission attempts and determine the cause of such failures. If the

unsuccessful attempts were caused by contractor errors, the Contractor shall correct the errors and retransmit the message within 24 hours of the corrections.

C.3.1.9 Hosted On-Line Ordering

 The Contractor shall provide a fully managed secure, scalable, hosted service to allow visitors to a Government and/or Contractor-provided website to access an on-line ordering service to order free and/or paid Government publications on a 24 x 7 basis. The ordering interface must be designed to accommodate multiple browsers, including at a minimum: AOL 6.0 and higher; MS Internet Explorer 5.0 and higher; Netscape 4.7 and higher; Opera 5.0 and higher; Safari 5.0 and higher; and Firefox, 1.0 and higher. The interface must also be compliant with Section 508 of the Rehabilitation Act Amendments of 1998. The service shall capture the required information and either provides the recorded information to the Government in electronic format, or uses the captured information to complete fulfillment requests.

C.3.1.10 Hosted E-Mail Web Form

The Contractor shall provide a fully managed hosted service to allow visitors to a Government website to access a contractor-developed and maintained web form for submitting e-mail inquiries to a designated e-mail address. The web form interface must be designed to accommodate multiple browsers, including at minimum: AOL 6.0 and higher; MS Internet Explorer 5.0 and higher; Netscape 4.7 and higher; Opera 5.0 and higher; Safari 5.0 and higher; and Firefox, 1.0 and higher. The interface must also be compliant with Section 508 of the Rehabilitation Act Amendments of 1998. The web form shall allow users to associate the topics of their inquiries with a list of frequently requested topics identified by the Government. The service shall capture all relevant information regarding the inquiry for transmission to the designated e-mail system.

C.3.1.11 Hosted FAQ Service

Government agencies operate a large number of websites that are accessed by the general public for information. Increased public usage of these web sites has generated a substantial increase in the number of e-mail inquiries to which agencies must respond. To reduce the workload associated with processing e-mail inquiries and to provide better customer service, the Government requires a technology-based solution that will enable agencies to leverage previous good answers to frequently asked questions (FAQs) and provide the answers to their customers 24 x 7 via self-service using the Internet.

The Contractor shall provide a secure, highly available and scalable hosted solution to enable visitors to subscribing Government websites to access answers to FAQs on a 24 x 7 basis. The service must accommodate multiple browsers, including at minimum: AOL 6.0 and higher; MS Internet Explorer 5.0 and higher; Netscape 4.7 and higher; Opera 5.0 and higher; Safari 5.0 and higher; and Firefox, 1.0 and higher. The interface must also be compliant with Section 508 of the Rehabilitation Act Amendments of 1998. The service must be able to be implemented within 45 calendar days from the date of the service request and:

- o Provide a user/administrator-friendly and intuitive interface that is easily configurable to match a website's look and feel.
- o Allow the content of the FAQ knowledge base to be published to multiple web sites, each with a customizable "look and feel" for different audiences, or for multiple audiences on a single site.
- o Support multiple languages, including at a minimum, English, Spanish, and Chinese.
- o Meet federal information systems security requirements.

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- o Allow both browse and search of FAQs answers from a single or multiple knowledge bases by subject and response categories, with results automatically ranked by relevancy, usefulness, or other appropriate methods selected by the Government, including manual ranking to increase or decrease a particular FAQ's prominence relative to others.
- o Have the capability for a user to submit an inquiry to either the Contractor or the subscribing agency for response. Allow Government and/or contractor personnel to review and/or respond to user inquiries in real time
- o Have the capability to collect user feedback on the effectiveness, usefulness, and customer satisfaction of the service
- o Allow users to subscribe to automatic notification of FAQ updates.
- o Provide both remote and onsite access to authorized personnel to all administrative functions, as appropriate
- o Store each FAQ and its corresponding answer as a separate record with a unique ID number; and allow information to be posted and modified in real time; enable each FAQ to be tagged with meta-data, which might include subject keywords, ownership, last updated date, expiration date, and other information.
- o Display last update for each FAO, if required.
- o Allow content managers to automate content management tasks, which might include reviewing, archiving, and purging of data. Provides automatic notification on expiring or outdated content based on specified review schedule
- o Be capable of presenting FAQs and their corresponding answers in a format that can be indexed by search engines (internal or external) without affecting performance metrics
- o Search, select, and sort FAQ answers from within separate knowledge bases. Provide capability to select which knowledge bases will be included in each topic query
- o Provide management reports on a scheduled or on-demand basis. Reports can be accessed via the web or by e-mail.
- o Provide time/date stamping and user-friendly tracking numbers for all information requests. Allow multiple sub-tracking numbers to be assigned to a single request if required for internal or external purposes
- o Include an automated query acknowledgement mechanism with a choice of customizable response messages.
- o Have the capability to automatically verify the validity of internal and/or external links contained in the FAQ system on a daily basis and notifying the Contractor of any invalid links. The link verification process shall not disrupt availability of the hosted FAQ service to end users.

The Government intends to harvest some or all of the information contained in the Contractor's FAQ knowledge bases through the USAgov.gov search service or other agency search services on a regular

basis. The Contractor shall allow these Government search services to access and retrieve relevant content of the FAQ knowledge bases and/or provide the capability to publish the data in Extensible Markup Language (XML) code to a designated Government or contractor system using standards and access/replication schedules that are mutually acceptable to the Contractor and Government.

C.3.1.11.1 FAQ Guidelines

The hosted FAQ service may be ordered with other Attended Services described in Section C.3.2 of this SOW or as a stand-alone service. If the Contractor is tasked to develop and administer the FAQ service, the Contractor shall conform to the following FAQ implementation guidelines:

o All answers to FAQ prepared by the Contractor shall be self contained and written in easy to read and understand language.

o All acronyms/abbreviations used and associated descriptions must be included within each

o URLs in all FAQ answers shall be written out in answer text (not embedded)

o Limit screen to 1 per answer (break content into usable chunks)

o Link to other answers rather than refer to a number or position on the page

o Last review/update date included with each answer

o Include an identification number for each FAO

o Include identifiers for like FAQs (e.g., agency jurisdiction) for grouping and subsequent extraction

C.3.2 Attended Services

The Contractor shall provide accurate, timely, complete, and courteous responses to all customer inquiries. The Contractor shall provide qualified staff to support the work types identified in Section C.2.1.4 of the SOW. The Contractor shall provide Attended Services via a dedicated solution or shared or non-dedicated solution, as specified by the Government in individual task orders.

C.3.2.1 Responding to Telephone Inquiries

The Contractor shall provide all qualified staff and required equipment and services necessary to respond to telephone and TDD/TTY inquiries in accordance with performance parameters and instructions provided by the Government in individual task orders. The tasks to be performed include, but are not limited to, the following:

Accurately responding to inquiries in a professional and courteous manner. These inquiries may
be in the form of telephone and TDD/TTY calls. When necessary, transfer or referral the
inquiries to the appropriate agency for response.

o Conducting research of Government-approved sources of information to prepare responses to inbound inquiries and developing appropriate responses accordingly.

 Capturing and tracking information related to inbound inquiries including date and time of receipt, nature of inquiry, source of inquiry if multiple telephone numbers are involved, customer identity when appropriate, information requested, disposition, response date, and any fulfillment

- actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided case management tool.
 - When necessary, forwarding recorded information via telephone, facsimile, or e-mail or other electronic transmission to the appropriate authority for further processing.
 - o Sending the requested information to a customer through the postal services, E-mail or facsimile, whichever is the most efficient delivery method and satisfies the customer.
 - o Recognizing new trends of inquiries for referral to management for development of common responses and reporting to the agency regarding sudden new lines of inquiry.

C.3.2.2 Outbound Calling Services

The Contractor shall provide all qualified staff and required equipment and services necessary to perform outbound calling to selected customers in accordance with performance parameters and instructions provided by the Government in individual task orders. The tasks to be performed include, but are not limited to, the following:

- o Performing outbound callbacks in response to user requests for callback service.
- Performing outbound callbacks to selected customers in order to follow up on questions or issues that could not be resolved during the initial contact, to verify problem resolution, or to measure customer satisfaction as directed by the Government.
- o Launching outbound calls to Government agencies for the purposes of relaying customer information, obtaining information in response to customer questions and/or issues that could not be resolved during the initial contact, or verifying problem resolution.
- o Performing outbound calls in support of customer surveys, program and/or product promotions, product recalls, sales and marketing, and special events.
- o Performing outbound calls in response to inquiries from callers using TDD/TTY devices.

C.3.2.3 Responding to Postal Mail Inquiries

The Contractor shall provide all qualified staff, and required equipment, services, and supplies necessary to respond to written inquiries received via postal mail in accordance with business rules, guidelines, and performance parameters specified by the Government in individual task orders. The tasks to be performed include, but are not limited to:

- Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is
 more efficient and satisfies the inquirer. When necessary, sending the requested information to a
 customer through the postal services, E-mail or facsimile whichever is more efficient and satisfies
 the inquirer
- o When requested by the Government, converting the inquiry documents to electronic format to facilitate routing, and response, and records management.
- o Conducting research of Government-approved sources of information to prepare responses to written inquiries, and developing appropriate responses accordingly.

- Recording and tracking data/information related to the inquiries, including date and time of receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided case management tool.
- o When necessary, forwarding the inquiries to the appropriate authority for further processing.
- o Reviewing to ensure that outgoing responses are accurate and complete in accordance with business rules and guidelines established by the Government.

The Contractor shall respond to postal mail inquiries within the designated time frame specified by the Government. The Contractor shall collect and deliver written correspondence in accordance with the format, process, and procedures established by the Government. Unless otherwise directed by the Government, the written response may not identify the Contractor by name unless that is the subject of the inquiry. If the information needed for the response is not available within a designated time frame, the Contractor shall call the inquirer or send an interim response stating when a final response may be expected. A form letter is acceptable. The Contractor may elect to use a Government-approved pseudonym rather than the name of an employee as the signer of the letter.

C.3.2.4 Responding to E-Mail Inquiries

The Contractor shall provide qualified staff and required equipment and services to respond to written inquiries received via e-mail. Responses shall be prepared in accordance with business rules, guidelines, and performance parameters specified by the Government in individual task orders. The tasks to be performed include, but are not limited to:

- o Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is more efficient and satisfies the inquirer.
- o Conducting research of Government-approved sources of information to prepare responses to written inquiries, and developing appropriate responses accordingly.
- Recording and tracking data/information related to the inquiries including date and time of receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided case management tool.
- o When necessary, forwarding the inquiries to the appropriate authority for further processing.
- o Sending the requested information to a customer through the postal services, E-mail or facsimile, whichever is more efficient and satisfies the inquirer.
- o Reviewing to ensure that outgoing responses are accurate and complete in accordance with business rules and guidelines established by the Government. If the initial response is found to be erroneous by the Contractor and/or the Government and further action is needed to inform the inquirer, the Contractor shall send a corrected response to the inquirer immediately.

The Contractor shall respond to e-mail inquiries within the designated time frame specified by the Government. The Contractor shall prepare the responses in accordance with business rules it has developed in conjunction with the Government, and/or with other guidelines provided by the

Government. A preformatted response or telephone response, if such is the most efficient and satisfies the inquirer, is acceptable.

The Contractor shall provide the required support to identify, record, and track the nature and volume of e-mail inquiries, and to measure the quality and timeliness of the response process from time of receipt to completed response. The Contractor shall accomplish this goal by tracking all incoming and outgoing e-mail messages and monitor the processing activities to determine the volume, nature and disposition of the inquiries. The Contractor shall benchmark the response process in its entirety to determine processing time of various types of e-mail inquiries and the skill sets required for responding to different types of inquiries and include the benchmark results in the requisite management reports. The Contractor shall monitor the performance of its personnel to ensure that productivity and quality standards, as specified in individual task orders, are met.

The Contractor shall provide ongoing support to refine business rules and prepare preformatted responses for use in responding to public inquiries in the most efficient and effective manner. The Contractor shall retain a history of agency contacts, including agency name and address, contact name, address, phone number, fax number, e-mail address, agency web site URL(s), and dates of previous contacts and nature of communications, and updates the information regularly.

The Contractor shall utilize auto-filtering, auto-response, and auto-suggestions where appropriate to identify and populate appropriate e-mail responses to customers. The Contractor shall ensure that all outgoing e-mail responses are accurate and complete.

The Contractor shall on its own initiative recognize and quantify new lines of inquiry, sometimes developing suddenly in response to a recent social/political/news event, and prepare (with the support of the Government) appropriate responses. The Contractor shall quickly apprise the Government of any new topical trend in inquiries in a timely fashion.

If a direct response to an e-mail inquiry cannot be provided, the Contractor shall forward the e-mail message to the appropriate Federal agency(ies) for direct response based on guidelines provided by the Government. The Contractor shall maintain a system to track the status of all inquiries directed to other agencies for response, including updates on final disposition of inquiries.

C.3.2.5 Responding to Facsimile Inquiries

The Contractor shall provide qualified staff and required equipment and services to respond to written inquiries received via facsimile. Responses shall be prepared in accordance with business rules, guidelines, and performance parameters specified by the Government in individual task orders. The tasks to be performed include, but are not limited to:

o Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is more efficient and satisfies the inquirer.

o Conducting research of Government-approved sources of information to prepare responses to facsimile inquiries, and developing appropriate responses accordingly.

o Recording and tracking data/information related to the inquiries, including date and time of receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided case management tool.

- o When necessary, forwarding the inquiries to the appropriate authority for further processing.
 - o Sending the requested information to a customer through the postal services, E-mail or facsimile whichever is more efficient and satisfies the inquirer.
 - o Reviewing to ensure that outgoing responses are accurate and complete in accordance with business rules and guidelines established by the Government.

The Contractor shall respond to facsimile inquiries within the designated time frame specified by the Government in individual task orders. Unless otherwise directed by the Government, all facsimile inquiries shall be received and stored electronically to facilitate distribution and processing. The Contractor shall convert and store incoming facsimile inquiries to a commonly used electronic format to facilitate distribution and processing. Unless otherwise directed by the Government, facsimile inquiries referred to other federal agencies for direct response shall be transmitted as e-mail attachments. When referring the inquiry, the Contractor shall note in the e-mail that the original inquiry was received as a fax document. Responses to facsimile inquiries may be via telephone, facsimile, e-mail, or other communications media, whichever is the most efficient and satisfies the inquirer. The Contractor shall retain a copy of all responses for recordkeeping. A preformatted or telephone response, if such is the most efficient and satisfies the inquirer, is acceptable.

The Contractor shall provide the required support to identify, record, and track the nature and volume of facsimile inquiries, and to measure the quality and timeliness of the response process from time of receipt to completed response. The Contractor shall accomplish this goal by tracking all incoming and outgoing facsimile messages and monitor the processing activities to determine volume, nature and disposition of the inquiries. The Contractor shall benchmark the response process in its entirety to determine processing time of various types of facsimile inquiries and the skill sets required for responding to different types of inquiries and include the benchmark results in the requisite management reports.

C.3.2.6 Interactive Web-Based Services

The Contractor shall provide qualified staff, equipment, software and services to support online interactive Internet-based services, such as web chat, using real-time text-based communication. The system supporting the chat service shall have the capabilities described in Section C.6.13 of this SOW.

C.3.3 Other Support Services

C.3.3.1 Fulfillment Services

Some Government agencies utilize fulfillment services provided by a Government entity, such as the Government Printing Office's Pueblo operations. However, there will be instances when an agency may require fulfillment services that can be performed more efficiently by the Contractor. When requested by the Government, the Contractor shall provide a complete fulfillment solution for purposes of providing customers with printed information. This information may be downloaded from sources including the Internet and/or other appropriate database applications (e.g., agency web site, Contractor-provided knowledge database). The tasks to be performed include, but are not limited to the following:

- o Retrieving the document from appropriate sources and, if necessary, printing the document for distribution.
- o Developing and/or implementing application(s) to track the print fulfillment status of all required records and files as specified.

1010 o Ensuring that tracking information is recorded and made available upon request as part of the Contractor-provided case management tool.

o Ensuring the system can accept multiple requests from a customer made during any one phone call or written inquiry.

Providing relevant documents to customers through the postal services, E-mail or facsimile, whichever is the most efficient and satisfies the inquirer.

The Contractor shall be responsible for supplying all printing equipment and supplies, mailing supplies, including envelopes and postage, and performing all fulfillment functions, such as addressing, insertion, and posting. The Government will provide the materials to be mailed or provide the sources where the materials can be obtained. Unless otherwise directed by the Government, all materials are to be sent via the least expensive class of U.S. Mail it can qualify for. Postage incurred by the Contractor for fulfillments will be reimbursed by the Government as Other Direct Charges (ODC).

C.3.3.2 Transcription Service

The Contractor shall provide qualified staff and equipment to transcribe messages recorded on voice mail and other recorded services. The Contractor shall perform transcription service on an as needed basis as specified in individual task orders (e.g., daily, weekly, monthly)

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C.3.3.3 Language Translation Services

The Contractor shall provide language translation services on an as-needed basis to allow non-English speaking customers the ability to communicate their needs to the Government. This capability shall include, but not be limited to:

o Supporting over-the-phone, e-mail, and fax language translation capabilities.

o Supporting for multiple languages, including English and Spanish. (Note: Agency language requirements may be extensive and will vary widely from agency to agency. The specific languages to be supported by the Contractor will be identified in task orders issued by the Government.)

o Providing a data collection tool to evaluate the need and usage of language translation services.

C.3.4 Directory Listing Services

The Contractor shall arrange for the listing of public contact numbers (both voice and TTY) and website URLs to appear in selected telephone directories, as specified in task orders issued by the Government. The Contractor shall ensure that contact numbers and web site URL appear in the "U.S. Government" sections of the Blue or White Pages, as appropriate. The contact numbers and web site URL shall be in bold type where that is available.

The Contractor is hereby advised that GSA currently manages a Government-wide Blue Pages project to provide a more centralized and citizen friendly approach of listing Government agency telephone numbers in certain Blue and Yellow Pages directories. For those directories that are not covered under the Blue Pages project, the Contractor shall provide for the listing of the telephone number, the associated web site URL, and the location address of each agency that serves the area covered by the applicable Blue

- 1058 and Yellow Pages directories. The Contractor shall coordinate with designated Government
- representatives to avoid duplication of listing. The costs of these listing shall be borne by the Contractor.
- The Contractor shall report these costs to the Government for reimbursement as Other Direct Costs (ODC).

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- C.3.5 Technical and Management Services
- The Contractor shall provide all required technical and management services as part of the citizen inquiry response and management solution. The functions to be performed include the following:

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- o Site Management
- 1068 o Program Management
- 1069 o Technology Management
- 1070 o Information Systems Security Management
- 1071 o Content and Knowledge Management
- 1072 o Contact/Case Management
- 1073 o Relationship Management
- 1074 o Customer Satisfaction Survey

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The above functions are further described in Sections C.3.5.2 through C.3.5.9 of this SOW. The Contractor shall provide a tiered pricing structure for providing technical and management services commensurate with the complexity of the requirements identified in task orders issued by the Government. The tiered structure shall include a core support component and an incremental support component.

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C.3.5.1 Core Project Management Support

1083 The core support component shall include, at a minimum, a project management staff (e.g., Contractor's 1084 Project Manager, site manager, technical personnel, human resources and quality assurance personnel, 1085 administrative personnel, content specialists, security personnel) and support services required to meet 1086 task requirements for a single site solution that involves information and information systems that are 1087 categorized as low impact in accordance with FIPS Publications 800-199, Standards for Security 1088 Categorization for Federal Information and Information Systems. The level of support required will be 1089 dependent on complexity of task requirements, as described below. For multi site solutions or more 1090 complex implementations and for information and information systems that are categorized as "moderate" 1091 or "high" impact, the Contractor may augment the core project management support with an incremental 1092 project management support component.

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C.3.5.1.1 Level 1 - encompasses tasks that involve work that is low complexity in scope. These tasks generally require the development and maintenance of simple scripts for automated voice response service and knowledge and/or customer databases. Training requirement of new employees is generally limited to 40 hours or less. Knowledge base and content development and maintenance, inquiry tracking and contact management, requirements are generally low. Reporting requirements are generally limited to system generated reports and periodic program summaries.

- 1101 C.3.5.1.2 Level 2 encompasses tasks that involve work that is low to moderate complexity in scope.
- 1102 These tasks general require the development and maintenance of moderately complex scripts for
- automated voice response service and knowledge and/or customer databases. Training requirement of

1104 new employees is generally limited to between 40 and 80 hours. Knowledge base and content 1105 development and maintenance, inquiry tracking and contact management, and reporting requirements are 1106 low to moderate.

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1108 C.3.5.1.3 Level 3 – encompasses tasks that involve work that is high complexity in scope. These tasks 1109 generally require the development and maintenance of highly complex scripts for automated voice 1110 response service and knowledge and/or customer databases. Training requirement of new employees is 1111 generally between 80 to 120 hours. Knowledge base and content development and maintenance, inquiry 1112 tracking and contact management, and reporting requirements are high.

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1114 C.3.5.1.4 Level 4 – encompasses tasks that involve work that is very high complexity in scope. These 1115 tasks generally require the recruitment and training of 100 or fewer new employees and the development 1116 and maintenance of extremely complex scripts for automated voice response service and knowledge 1117 and/or customer databases. Training requirement of new employees is generally between 120 to160 1118 Knowledge base and content development and maintenance, inquiry tracking and contact 1119 management, and reporting requirements are very high.

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C.3.5.1.1 Incremental Support

1122 The Contractor shall provide incremental support to accommodate multi-site solutions and/or to support 1123 projects involving more complex implementations, and/or for projects that involve information and information systems that are categorized as "moderate" or "high" impact, and/or to support new 1124 1125 requirements added subsequent to initial project implementation.

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1127 C.3.5.2 **Site Management**

1128 The Contractor shall provide qualified personnel to manage and operate the contact center(s) to ensure 1129 optimum performance of systems and personnel. The Contractor shall analyze historical work volume, 1130 employee availability and schedule preferences, and trends to accurately forecast and schedule staffing 1131 resources to meet fluctuating workload requirements for all communications channels. The Contract shall 1132 employ proven best practices management approaches to ensure optimum utilization of available staffing resources to meet service objectives. 1133

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C.3.5.3 **Program Management**

1136 The Contractor shall provide program management, oversight, and quality control of contact center 1137 services, systems, and components, including, but not limited to the following tasks:

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1139 Project management - Ensure the successful implementation, operation, and management of 1140 the inquiry response and management solution as prescribed in this Statement of Work and task orders 1141 issued by the Government.

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1143 C.3.5.3.2 Oversight - Serve as the single point of contact to: assist in engineering, planning, and 1144 administrative functions as needed to meet task order requirements; coordinate activities among Government offices, business partners, contractors, and other relevant organizations; resolve questions or issues related to hardware, software, communications, applications, and programs, including dispute resolution with service providers; escalate irresolvable technical issues to the appropriate Government official for final resolution; and develop resolution mechanisms to resolve technical issues and problems among contractors to minimize conflict and delay of services.

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1151 C.3.5.3.3 Process Management - Develop, document, and maintain work processes and business rules 1152 used to support task requirements.

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1154 C.3.5.3.4 *Recruitment and Retention* - Develop and implement plans for the recruitment and retention of qualified personnel needed to meet task requirements.

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1157 C.3.5.3.5 *Workforce Management* – Analyze historical work volume, employee availability and schedule preferences, and trends to accurately forecast and schedule staffing resources to meet fluctuating workload requirements for all communications channels. The Contractor shall employ proven best practices management approaches to ensure optimum utilization of available staffing resources to meet service objectives.

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1163 C.3.5.3.6 *Performance Management* - Develop and implement the required plans, procedures, methodologies, and tools, and perform the planning, oversight, and management functions to ensure that all service delivery performance standards and program deliverables specified in the task order are met.

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1167 C.3.5.3.7 *Training* – Develop and implement a comprehensive Training Plan to ensure that contact center staff provides superior levels of customer service across all customer access channels.

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1170 C.3.5.3.8 *Quality Assurance/Quality Improvement* - Develop, implement, and manage a Quality 1171 Assurance/Quality Improvement Plan to ensure that services delivered comply with the performance standards specified by the Government.

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1174 C.3.5.3.9 *Continuous Process Improvement* - Develop and implement action plans based on analysis of performance results and customer feedback. These plans shall be available to the Government for review upon request.

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1178 C.3.5.3.10 *Information Systems Security Compliance Oversight* – Serve as a single point of coordination to ensure compliance with minimum federal information systems security requirements, including keeping abreast of and distribution of Federal security requirements, and preparation and submission of required documentations and deliverables pertaining to compliance with these requirements. Maintain Contingency/Disaster Recovery Plan and activate and oversee emergency/disaster recovery activities in accordance with the Plan.

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1185 C.3.5.3.11 *Management Reports* – Develop and deliver all requisite management reports and ensure all reports are accurate and provided in a timely basis.

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1188 C.3.5.3.12 *Value Engineering* – Develop and implement action plans to identify opportunities to improve service offerings, reduce costs, and increase customer satisfaction.

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1191 C.3.5.3.13 *Topic Trend and Reporting* – Collect information and provide reports on topics introduced by 1192 the public, often in response to social/political issues of the day, and to work with the Government to 1193 prepare appropriate responses.

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C.3.5.4 Technology Management

The Contractor shall provide all required technology management services to effectively plan, implement, operate and manage the contact center solution, including, but not limited to the following:

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1199 C.3.5.4.1 *Infrastructure and Network Management* - Plan, design, implement, operate, maintain, and manage the contact center site and technology infrastructure and related networks, including, but not limited to: information and telecommunications systems hardware, software, and services.

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- 1203 C.3.5.4.2 *Coordination* Recommend, process, coordinate, and monitor telecommunications orders, serving as a liaison with telecommunications vendors.
- 1207 C.3.5.4.3 *Monitoring* Perform real-time monitoring of call delivery. Monitor network and system performance and identify problems and outages; compile and maintain a log of problems, outages, service interruptions, and unauthorized access; notify designated Government personnel promptly of any problems, service disruptions, and unauthorized access.
- 1211 C.3.5.4.4 *Traffic Analysis* Analyze traffic and usage data to determine network performance levels.
 1212 Recommend improvements in network design in accordance with customer service standards and cost efficiencies.
- 1215 C.3.5.4.5 *Optimization* Provide optimized call routing design based on availability of network-based or systems-based call routing capabilities. Provide optimized automated announcement system design based on availability of network-based and systems-based automated announcement capabilities.
- 1219 C.3.5.4.6 *Contingency/Disaster Recovery* Perform all functions in support of implementing the Contingency/Disaster Recovery Plan.

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C.3.5.5 Information Systems Security Management

- The E-Government Act (Public Law 107-347) recognizes the importance of information security to the economic and national security interests of the United States. Title III of the E-Government Act, entitled the Federal Information Security Management Act (FISMA) requires each federal agency to develop, document, and implement an agency-wide program to provide information security for the information and information systems that support the operations and assets of the agency, including those provided or managed by another agency, contractor, or other source.
- The Office of Management and Budget (OMB) through Circular A-130, Management of Federal Information Resources, requires federal agencies to: plan for security; ensure that appropriate officials are assigned security responsibility; periodically review the security controls in their information systems; and authorize system processing prior to operations and, periodically, thereafter. This authorization by senior agency officials, often referred to as the Designated Approving Authorities (DAA), is sometimes referred to as accreditation. The technical and non-technical evaluation of an IT system that produces the necessary information required by the authorizing official to make a creditable, risk-based decision on whether to place the system into operation is known as certification. The individual responsible for making a technical judgment of the IT system's compliance with stated security requirements, identifying, assessing, and documenting the risks associated with operating the systems, coordinating the certification activities, and consolidating the certification and accreditation documents, is referred to as the certification agent or certifier. For additional information on Federal information systems security requirements, the Contractor should consult and become familiar the publications and guidance found at the National Institute of Standards and Technology Computer Science Resources Center website at http://csrc.nist.gov/publications/nistpubs/index.html. Publications of special interest include but are not limited to the following:
 - o FIPS Publication 200, Minimum Security Requirements of Federal Information Systems
- 1248 o FIPS Publication 199, Standards for Security Categorization of Federal Information and Information Systems
- 1250 o NIST Special Publication 800 53 Recommended Security Controls for Federal Information Systems

- 1252 o NIST Draft Special Publication 800-53A Guide for Assessing the Security Controls in Federal Information Systems
- 1254 o NIST Special Publication 800 30 Risk Management Guide for Federal Information 1255 Technology Systems
 - NIST Publication 800-18, Guide for Developing Security Plans for Information Technology Systems
 - o NIST Publication 800-34, Contingency Planning Guide for Information Technology Systems
 - NIST Publication 800-37, Guide for Security Certification and Accreditation of Federal Information Systems

In additional to the above documents, the contractor is expected to adhere to agency security guidelines that provide further guidance on information systems security requirements for individual task orders.

Unless stated otherwise in the task order, the contractor is responsible for preparing, managing and maintaining all required documentation and fulfilling agency reporting requirements for the FISMA compliance process, including e-authentication risk assessment, system categorization, security plan, risk assessments, contingency and contingency test plans, configuration management plan, POA&M, system test and evaluation reports, security certification and accreditation package.

The Contractor shall develop, implement, and maintain a security plan that ensures the confidentiality, integrity, and availability of information and systems for the duration of this contract. The security plan shall contain, at a minimum, the information outlined in Special NIST Publication 800-18, Guide for Developing Security Plans for Information Technology Systems. Additional information may be required at the discretion of agency DAAs in accordance with agency policies or directives as specified in task orders. The Contractor shall be responsible for preparing all required documentation needed for the compliance process. The Contractor shall assign a technically qualified Information Systems Security Manager (ISSM) who will be responsible for ensuring compliance with all Federal information systems security requirements, including the preparation and submission of the following:

Security Plan – provides an overview of the security requirements for the information and IT systems and describes the existing or planned controls (management, operational, and technical) for meeting those requirements. The Plan also describes the systems and delineates responsibilities and expected behavior of individuals who access the systems.

Security Test and Evaluation Reports – determines the systems' compliance with security requirements documented in the Security Plan and verifies that the security controls identified in the Plan are correctly implemented and effective. The Security Test and Evaluation Reports shall be prepared by a third party vendor selected and paid for by the Contractor. All work performed by the third party vendor shall be submitted, reviewed, and approved directly by the Government. The Government reserves the right to have the Security Tests and Evaluation Reports done by its own contractor. The contractor shall cooperate fully with the third party vendor or the Government's contractor in the preparation of such reports.

Risk Assessment Report – determines the degree of risk associated with the confidentiality, integrity, and availability of the IT systems and the information they process, store, and transmit.

Certifier's Statement – documents that the security controls are correctly implemented and effective in their applications. The statement provides an overview of the security status of the system, and brings together, all of the information necessary for the DAA to make an informed, risk-based decision. The

1301 contractor ISSM shall prepare all certification and accreditation (C&A) documents for submission to an agency-designated ISSM. The agency ISSM will coordinate the submission of the C&A documents to the DAA for approval.

The Contractor shall correct any deficiencies identified in the certification and accreditation process until full accreditation from the DAA is obtained. The Contractor shall implement procedures for communicating to the Contracting Officer and/or designated key personnel security-related issues that impact Contractor performance under this contract. Such procedures shall include an escalation process defining various stages of issue severity and the notification level appropriate to each.

C.3.5.5.1 Personnel Security

The Contractor shall perform appropriate personnel screening in accordance with their administrative hiring policies and agency requirements, including compliance with Homeland Security Presidential Directive 12 (HSPD-12). Such policies may or may not include collecting and reviewing any or all of the following information for each prospective candidate to determine if the applicant is a potential candidate for employment:

- o credit and/or criminal history inquiry
- o employment verification
 - o drug screening

All information collected and actions taken shall be done in accordance with applicable Federal, state and local laws and statues.

C.3.5.5.2 Information and Telecommunications Systems Security

The Government requires that all contractor-provided information and telecommunications systems be made secure from unauthorized access and use. Access to the required filing system, including but not limited to written correspondence, shall be limited to only those personnel who are authorized to support a given task. The Contractor shall maintain a listing of those employees with authorized access. When designing system security, Contractor shall address factors including, but not limited to:

Information systems - Ensure that all information handled by computer systems is protected against unauthorized access, misuse, fraud, misappropriation, espionage, sabotage, and inadvertent or deliberate compromise.

Telecommunications systems - Provision of telecommunications security is sufficient to protect all incoming and outgoing calls and electronic inquiries/responses, and all data collected from these activities, from unauthorized access or loss.

Software applications and databases - Access to software applications and databases is limited to only those personnel who are authorized to support a given task. Such restriction is accomplished through the use of customized menus, user log-on identification codes, operator-defined password protection, and or automatic timeout values. The Contractor shall use expiration dating as a method of password security maintenance.

1346 Internet and E-mail usage policy – Guidelines regarding to appropriate Internet access and usage is 1347 implemented and enforced. Policies addressing access to and disclosure of electronic mail messages sent 1348 or received by employees using Contractor's corporate E-mail system shall also be implemented and

enforced. Such guidelines will inform employees that their privacy does not extend to their use of Contractor-provided equipment or supplies.

System testing - System testing is performed on a regular basis to monitor adherence to, and compliance with, stated security measures.

Audits - Contractor shall be subject to periodic system audits in the same manner and fashion as conducted by the Government. Such audits shall relate to both Contractor-provided systems and Contractor's use of Government-provided data under this contract. Examples of such audits include IG and security audits, generation of active employee listings to verify user identification maintenance practices, retrieval of user activity reports and archived security information, and demonstration of Contractor's ability to monitor, collect, store, and control access to usage data.

Proper Notification - Contractor shall report all attempts made, whether successful or not, to breach the physical security of the facilities or primary data centers where the work is performed, or any related telecommunications and information systems that support each task. The Contractor shall adhere to applicable agency IT Incidence Handling Procedures for reporting these intrusions, including escalation to Department of Homeland Security FedCIRC if necessary. Such reports shall be made to the Government as soon as possible and in no event more than twenty-four (24) hours after discovery of the incident. In rare instances, the Contractor may receive calls that threaten the well being of the Government and/or other personnel or property. The Contractor shall ensure that procedures are in place to report the calls immediately to the appropriate law enforcement agency(ies).

C.3.5.5.3 Facility Security

 Contractor is responsible for providing a physically secure facility for people, equipment, and documentation. All security requirements apply to the Contractor facility, alternative facility, or any subcontractor facilities. When designing physical security measures, Contractor shall address factors including, but not limited to:

Controlled access - All personnel who enter the facility shall be issued a badge or identification card. Employees have a permanent badge and approved visitors receive a temporary badge. In general, facility access is limited to: Contractor personnel performing work under contract; authorized Government personnel; maintenance personnel or suppliers performing upkeep or repair of facilities or equipment; customer personnel visiting the site on official business; and personnel as approved jointly by Contractor and the Government. Contractor must obtain Government approval prior to granting either current or potential customers access to areas where Government work is performed. Terminated employees shall have their badges removed and their accounts deactivated and/or deleted from any system access immediately upon termination. Proof of such removal shall be documented by Contractor and made available to the Government upon request.

Data and telecommunications center - The primary data and telecommunications center is secured through the use of key-code access or equivalent technology with entrance granted only to those requiring access to this area on a regular basis to perform their normal job functions or who are escorted as in the case of visitors or technicians.

Confidential information - Subsequent to the award of each task order, the Government will provide Contractor with a listing of items it deems proprietary and confidential in nature. Examples of such data include, but are not limited to, customer names, addresses, and social security numbers. Contractor shall implement appropriate security measures to ensure such data is safeguarded in a manner consistent with

those employed by the Government. Examples of data security include locked file storage, confidentiality stamping, restricted system access, data encryption, restricted print options, and disposal by shredding.

Proper notification - Contractor shall report all attempts made, whether successful or not, to breach the physical security of the facilities or primary data centers where the work is performed, or any related telecommunications and information systems that support each task. The Contractor shall adhere to applicable agency IT Incidence Handling Procedures for reporting these intrusions, including escalation to Department of Homeland Security FedCIRC if necessary. Such reports shall be made to the Government as soon as possible and in no event more than twenty-four (24) hours after discovery of the incident. In rare instances, the Contractor may receive communications such as calls or e-mail that threaten the well being of the Government and/or other personnel or property. The Contractor shall ensure that procedures are in place to report the threatening communications immediately to the appropriate law enforcement agency(ies).

C.3.5.5.4 Contingency/Disaster Recovery

The Contractor shall develop and implement, as part of the Security Plan, contingency/disaster recovery plans and procedures addressing operations in the event of a shutdown or lapse in service for any reason. This is to minimize service disruption to Government customers. The plan shall identify risks as well as steps necessary to prevent it from happening in the first place. The plan shall include an alternate set of steps to minimize the impact should prevention fails. The plan must define the precise steps to be taken to recover as quickly as possible, including recovery procedures for physical facility, data systems, contact center systems and applications, communications networks, electrical service, customer access points, partners and procedures, and staff. The Contractor shall develop and implement procedures to test the plan on an annual basis, at a minimum. The plan shall be developed in accordance with Contingency/Disaster Recovery requirements specified in individual task orders and applicable agency IT Security Policy and NIST Special Publication 800-34, Contingency Planning Guide for Information Technology Systems.

C.3.5.5.4.1 Program Operations Recovery

In the event of periodic or catastrophic failures that restrict or terminate program operations, the design of both the contact center infrastructure and the communications network servicing the Government requirements shall include sufficient redundancy to allow normal business operations to continue with minimal disruption and inconvenience to customers for all access channels.

C.3.5.5.4.2 Voice Recovery

When designing disaster recovery plans for the communications network, Contractor shall address factors including, but not limited to:

Network routing - If an individual facility should become inaccessible, a sufficient communications network shall be in place to allow for forwarding of customer calls to one or more alternate facilities. If the outage is brief, the network shall resume normal call routing as soon as the primary facility is operational again.

o Operational impact - Documented policies shall exist for assuming workload from an incapacitated facility for immediate, short-term, and long-term relief.

o Simulated tests - Regularly scheduled simulated tests shall be conducted for purposes of preparing the staff and assessing the plan's viability.

1447 C.3.5.5.4.3 Data Recovery

When designing disaster recovery plans for data recovery, Contractor shall address factors including, but not limited to:

o Backup routines - The ease and frequency of which backup routines are conducted and the ability to backup data on remote servers/processors.

o Effectiveness - The degree to which data can be compressed for backup purposes and the ability to perform unattended backups on high-density/high-capacity storage devices.

Operational impact - The time that is required to complete backups and the need to remove users from the system to conduct backup routines.

O Data integrity - The methods of maintaining data integrity so that completed transactions are not lost due to outages, system failures, etc. In long-running transactions, such as when a IS needs to navigate several screens of data entry, there should be interim checkpoints that save the transaction so that it may be re-entered from the last checkpoint if the transaction wasn't completed prior to the failure.

O Data recovery - The methods of restoring data from backup in the event of a failure (e.g., commercial power failure, system or hardware failures).

o Simulated tests - Regularly scheduled simulated tests shall be conducted for purposes of preparing the staff and assessing the plan's viability.

C.3.5.5.4.4 Notification Process

Contractor shall implement procedures for communicating to the Government primary point of contact and/or designated key personnel disaster-related issues that inhibit contact center operations. Such procedure shall include an escalation process defining various stages of issue severity and the notification level appropriate to each.

C.3.5.6 Content and Knowledge Management

1479 The Contractor shall perform all content and knowledge management functions including the following: 1480

Automated Voice Response Development and Maintenance - The Contractor shall be responsible for call flow design and development and maintenance of the information content and audio messages used for all automated voice response services, such as IVR, voice recognition, and text-to-speech services. The Contractor shall provide analysis and ongoing support for script design and optimization, call flow analyses, service request processing and coordination, if required, and script management. The Contractor shall develop and regularly maintain messages for the automated voice response services in keeping with the current informational needs of the callers. The Contractor shall work closely with the Government to develop the automated responses. The Government shall approve all automated responses before they are implemented. The Contractor shall ensure timely updates of all automated messaging in accordance with the turnaround timeframes established by the Government. At a minimum, Contractor shall post changes within 24-hours of receipt for all non-emergency information and within 2-hours of receipt for emergency notices. Support for emergency postings and updates, as determined by the requesting agency, is required on a 24 hour a day, 7 day a week basis.

Knowledge Management - The Contractor shall develop, implement, administer and manage the required knowledge management system to effectively meet task order requirements. The Contractor shall update, revise, and otherwise maintain currency and accuracy of the knowledge base as new information becomes available. The Contractor shall incorporate best practices in system design to minimize the burden of maintaining the required knowledge base and maximize its effectiveness. The Contractor shall develop systematic approaches to finding, understanding, and using relevant knowledge to achieve task objectives, including, but not limited to, reviewing newspapers, the Internet, publications, and other information resources. The knowledge management system shall be accessible to all Contractor personnel. The Contractor shall also provide access to the system via the Internet to designated Government employees at remote locations. The number of individuals to be provided access will be specified in individual task Access to the knowledge databases shall be limited based on the individual user's program support needs and level of authority, and shall be restricted only to authorized personnel. Government will brief the Contractor on the relevant programs and services and current business processes, and provide the initial content data to be recorded in the knowledge management system. Subsequent to the initial effort, the Contractor shall provide services, including, but not limited to the following:

o Collect, organize, select, record, verify, update, and present relevant information in the knowledge management system on an ongoing basis.

o Update and manage the content of the knowledge management system on an on-going basis.

o Develop a procedure to ensure agency concurrence on all updates and information dissemination from the knowledge management system to any other media.

o Conduct research of agency-approved sources of information and develop appropriate responses to customer inquiries.

o Organize information into suitable means for easy access by all contact center employees, Government employees, and/or customers.

o Analyze usage data of the knowledge management system to determine trends and patterns.

o Analyze new inquiries and inquiry trends to develop responses based on research.

o Collect, organize, and prepare information and answers to frequently asked questions for dissemination using automated systems, such as interactive voice response, automatic fax-back, information search and retrieval systems, and web-based systems.

o Where new and topical inquiries arrive, have a mechanism for collection (from IS to management), quick preparation of response, and a means of advising the Government of these sudden unexpected influxes of question categories

o Ensure that, where applicable, additions, changes, or deletions of materials from the knowledge database are carried over to corresponding IS training and support materials.

 Website Content Coordination - The Contractor shall share relevant inquiry data and trends with agency web support team to ensure that information provided at the agency websites and the contact center is accurate, up-to-date, and meets the needs of agency customers.

 o Filing System - The Contractor shall establish and maintain a filing system that shall allow Government oversight of, at a minimum, written and electronic correspondence, employee (but

not individual) performance, work stoppages, agency liaison, hardware and software maintenance, database maintenance, call data, and contract reports.

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C.3.5.7 Contact/Case Management

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C.3.5.8 Relationship Management

The Contractor shall provide required customer coordination support to meet task order requirements, including, but not limited to the following tasks:

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 Coordinate with Government agency representatives, business partners, contractors, and other relevant individuals or organizations to discuss implementation, operational, and programmatic issues.

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o Provide planning and coordination support to implement and manage the Directory Listing Service.

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C.3.5.9 Customer Satisfaction Assessments

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C.3.6 Special Project Support

The Contractor shall provide technical and management support needed to analyze, plan, design, implement, operate, and manage special services that may be needed to meet the diverse needs of the Government. These special services (e.g. web hosting, prototyping of new capabilities, special applications and systems interconnectivity) will be priced on a task order-by-task order basis utilizing the support functions identified in Section C.3.5 of this SOW, as deemed appropriate by the Contractor. The Contractor shall provide all necessary personnel, facilities, equipment and services needed to support special services as identified in task orders issued by the Government. Equipment, software, and services not otherwise priced in Section B may be priced as Other Direct Costs (OCD).

C.4 STAFF TO BE PROVIDED

The Contractor is expected to support the diverse needs of a wide range of Government programs. The Contractor shall provide qualified personnel in sufficient quantities to perform the functions identified in this SOW and individual task orders. Unless specifically allowed in individual task orders, all work performed shall be at contractor-managed facilities. All matters pertaining to the employment, supervision, compensation, promotion, and discharge of the Contractor's employees shall be the responsibility of the Contractor, which is in all respects the employer of such employees. All proposed substitutes for key personnel shall meet or exceed the qualifications of the person to be replaced. The Government shall be notified in writing of any proposed substitution of key personnel at least thirty days in advance of the proposed substitution.

The Contractor shall perform background checks on all prospective employees in accordance with applicable agency Personnel Security Handbook prior to providing them for service under the contract. At a minimum, this check shall ensure that no prospective employee has a criminal misdemeanor or a felony record and has a satisfactory history of credit. Additional background checks or security clearances may be required as specified in individual task orders.

C.4.1 Key Personnel

The Contractor must have the capability to provide qualified personnel to meet the specific requirements of each task order. At a minimum, the Contractor shall provide the following key personnel:

C.4.1.1 *Program Manager* - responsible for managing and implementing the overall contract requirement and oversee implementation of more complex tasks; organizes, directs, coordinates planning, and implements all contract and/or task order support activities; interacts with high level program officials regarding issues and status of the contract and/or task orders; coordinates financial and staffing resources; monitors and analyzes contract and performance data and reports results to senior Government officials; coordinates recruitment and training activities to keep staff current on agency programs and performance objectives; manages the activities of subcontractors; and reviews contract, operations and management reports. The Government reserves the right to approve the selection of the Contractor-assigned Program Manager prior to his/her placement in supporting the task if such assignment is warranted.

C.4.1.2 *Project Manager* - responsible for managing and implementing individual task requirement; organizes, directs, coordinates planning, and implements all project support activities; interacts with program officials regarding issues and status of the project; coordinates financial and staffing resources; monitors and analyzes performance data and reports results to the Government; coordinates training activities to keep staff current on agency programs and customer service objectives; manages the activities of subcontractors; and prepares operations and management reports. For each task, the Government reserves the right to approve the selection of the Contractor-assigned Project Manager prior to his/her placement in supporting the task.

C.4.1.3 *Site Manager* - responsible for overall daily operations and management of the contact center, including staffing, facility, training, service delivery, problem escalation and resolution, and performance monitoring; provides technical assistance to the planning, design, installation, modification, and operation of telecommunications and information systems capabilities; ensures all functions and processes are implemented and operated properly.

C.4.1.4 Information Systems Security Manager (ISSM) – responsible for ensuring that information systems used in supporting task requirements meet initial and ongoing compliance of information systems security requirements in accordance with FIPS Publication 200, Minimum Security Requirements of Federal Information Systems. The ISSM shall ensure that information systems used to support a specific task meet the minimum security requirements as defined in FIPS Publication 200 through the use of security controls in accordance with the NIST Special Publication 800 - 53, Recommended Security Controls for Federal Information Systems, As Amended. This includes preparing all required documentations for the compliance process, including security plan, risk assessments, contingency and contingency test plans, configuration management plan, system test and evaluation reports, security certification and accreditation package.

To meet specific task requirements, the Government may require the assignment of one or more key personnel in support of a task. The Government may also identify additional key personnel requirements in individual task orders.

C.4.2 Support Staff

The Contractor shall provide sufficient qualified support staff to perform functions including, but not limited to:

 C.4.2.1 Human Resources Management - ensure the placement of qualified candidates into open positions by participating in employment-related activities such as recruiting, screening, testing, evaluating, behavioral interviewing, and hiring for a wide variety of positions; prepares employment-related reports; conduct new employee orientation sessions; experienced in employee relations, legal compliance, and compensation matters.

C.4.2..2 Supervision - supervise and coordinate the daily workflow to ensure productivity and quality standards are met and customer service efforts are consistently achieved; assist the manager in the administration of the unit; provide leadership, guidance, training, and work direction to assigned personnel to ensure goals and objectives are met; foster a work environment that respects individuals, promotes teamwork, and encourages innovation and creativity.

C.4.2.3 Quality Assurance - assess the quality of service provided by ISs through monitoring incoming calls and other work types while focusing on the quality of customer service, accuracy of information provided, and adherence to departmental policies and procedures; analyze operational performance against company and customer expectations and identifies areas of competency and areas of needed improvement; establish and maintain systems for capturing, analyzing and reporting quality measures; interface with other operational and cross-functional areas to ensure consistency in reporting practices and to help determine quality needs; provide recommendations on continual process improvement.

C.4.2.4 *Training* - design, develop, evaluate, and deliver training programs for all levels of staff; evaluate the applicability and quality of training programs offered by outside vendors; complete needs assessments to identify future training needs and provide guidance to staff on matters related to continuing education; design course manuals, support materials and tools; perform administrative duties related to employee training such as scheduling classes, ordering/maintaining supplies, maintaining training records and a library/database of training materials and subject matter experts; conduct surveys of training and equipment needs; conduct follow up studies to determine overall training effectiveness; prepare formal reports and correspondence. Where appropriate, effective, and efficient, arrange for training, initial or refresher, by Government staff if the Government agrees.

C.4.2.5 Service Level Management - manage overall forecasting and staffing processes to ensure efficient, cost-effective overall IS utilization; creates, execute and oversee effective plan (annual, weekly, daily); work closely with Project and Site Managers to assist in determining future staffing requirements, optimize site scheduling, balance workload across the network, maximize performance and meet overall objectives; review on an on-going basis, existing technologies and software recommending changes as needed to ensure maximum utilization of resources; manage actual performance feedback against targets, identify shortfalls, take corrective action and make adjustments accordingly; conduct need assessment to ensure continual improvement of overall forecasting and staffing performance.

C.4.2.6 *Knowledge/Content Management* - research and resolve open issues by thorough and efficient investigation; create, index, and maintain knowledge database records and answers to FAQs; ensure the accuracy and clarity of information recorded; purge outdated records from the system in accordance with records management guidelines provided by the agency; communicate record additions or changes to all staff on a timely basis.

C.4.2.7 *Inquiry tracking* – capture and track all relevant information and disposition of all inquiries; ensure inquiries are completed on a timely basis.

C.4.2.8 *Technical support* - ensure all areas of systems architecture, security, design, development, analysis, installation, programming, testing, maintenance, administration, and ongoing support for contact center hardware, software, network, telecommunications, and Internet equipment and services.

This is not a complete list of all responsibilities, duties, efforts, or skills associated with these positions, but is intended to serve as an overview of the functions that the Contractor is expected to perform.

C.4.3 Information Specialists (IS)

The Contractor shall provide sufficient contact center IS staff to perform the functions specified in individual task orders. The Contractor shall ensure that ISs possess the appropriate qualifications and skills required to perform the task. Unless specifically authorized in the task orders, all ISs shall be situated in contractor-provided facilities with restricted access.

C.4.3.1 Qualifications - Each member of the Contractor-provided IS staff shall meet the following minimum requirements:

o High school diploma or General Educational Development (GED) Certificate

 O Language proficiency equivalent to meeting an Interagency Language Roundtable (ILR) Level-5 or S-5 requirement. An individual at this level is described as follows: a) has a speaking proficiency equivalent to that of an educated native speaker; and b) has complete fluency in the language, such that speech on all levels is fully accepted by educated native speakers in all of its features, including breadth of vocabulary and idiom, colloquialism, and pertinent cultural preferences.

C.4.3.2 Competencies - The Contractor-provided IS staff shall demonstrate the requisite skills and knowledge to perform the following functions, at a minimum:

Oral and written communication skills sufficient to facilitate clear and accurate information exchanges with customers.

1745 • Ability to control the pace and flow of the inquiry/request and manage call time effectively.

O Ability to handle inquiries and requests in a courteous and professional manner, including calls received in crisis situations, and/or from abusive callers.

o Ability to listen to and empathize with customers and acknowledge their concerns.

o Ability to follow protocol and to apply sensitivity and discretion in handling confidential information.

o Ability to gather information to determine a customer's needs, apply problem-solving skills, and resolve the inquiry/request effectively.

o Computer and keyboarding skills sufficient to record information from the inquirer in an accurate and efficient manner.

o Ability to use the web to search and retrieve information.

O Ability to receive inquiries from the hearing, speech, and visually impaired, as well as other physically impaired callers and route them to the appropriate IS or queue for response.

o Ability to take direction within a team setting and complete team-related work promptly.

o For IS assigned specifically to support TTY callers, ability to effectively respond to inquiries using appropriate equipment.

C.4.3.3 Skills Categories

The Contractor shall provide qualified personnel in sufficient quantities to perform the functions identified in task orders issued by the Government. The Contractor is expected to support the diverse needs of Government programs. The skills categories identified below are those that the Government anticipates may be required to satisfy the diverse needs of agency programs. The specific skills category(ies) required will depend on the complexity of work to be performed, as identified in individual task orders. The Government reserves the right to add other skills categories to meet agency requirements at any time during the effective period of this contract.

C.4.3.3.1 Level 1 - Handles telephone and e-mail inquiries that are routine and transactional in nature. Captures or disseminates basic information, utilizing a prepared script. Little or no deviation from script is permitted in responding to inquiries. Proficient in using automated tools, search and information retrieval systems, and knowledge and contact management systems. Requires High School diploma, or GED.

C.4.3.3.2 Level 2 – Handles inquiries received via multiple communication channels (e.g., phone, email). Nature of inquiries involves subjects that are moderate in complexity. Responses are generally scripted but may require probing of callers for specific information. Proficient in using automated tools, search and information retrieval systems, and knowledge and contact management systems. Requires High School diploma, or GED and some college, or equivalent combination of education and prior customer service experience. Requires general knowledge of Government programs.

1793 C.4.3.3.3 Level 3 - Handles inquiries via multiple communication channels. Nature of inquiries involves subjects that are high in complexity. Responses are not scripted and require frequent probing of callers for specific information. Proficient in using automated tools, search and information retrieval systems, and knowledge and contact management systems. Requires Associate degree and prior experience in one or more specialized areas. Requires specialized knowledge of Government programs and/or subject matters.

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C.4.3.3.4 Level 4 - Handles inquiries via multiple communication channels. Nature of inquiries involves subjects that are very high in complexity and requires subject matter experience. Responses are not scripted and require extensive probing of callers for specific information. Proficient in using automated tools, search and information retrieval systems, knowledge and contact management systems, and other specialized systems. Requires Bachelors degree or equivalent work experience and subject matter experience.

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C.4.3.3.4 Level 5 - Handles inquiries via multiple communication channels. Nature of inquiries involves subjects that are highly specialized and requires subject matter expertise. Responses are not scripted and require extensive probing of callers for specific information. Proficient in using automated tools, search and information retrieval systems, and knowledge and contact management systems, and other specialized systems. Requires advanced degree or equivalent work experience and subject matter expertise.

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C.4.3.3.5 Minimum Qualifications Requirements for Supervisory Information Specialists

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In addition to meeting minimum education and/or experience requirements specified for Information Specialists specified above for the respective skill category, Supervisory Information Specialists shall meet the following minimum requirements:

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- Two or more years experience serving as an Information Specialist at the respective skill level, or one or more years of experience supervising Information Specialists at the respective skill level.
- Excellent oral and written communications skills
- Strong organizational skills
 - Skilled at oral and written reviews as well as coaching to improve performance
 - Must be positive and self-motivated with the ability to change priorities on demand
 - Solid understanding of computer basics (Windows, Excel, Word, Operating Systems and Internet applications such as web, email, and chat).

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C.4.3.4 Multi-language Support

The Contractor shall provide qualified personnel in sufficient quantities to meet the language requirements specified in individual task orders. At a minimum, the Contractor must have the capability to supply ISs who are proficient the following languages:

- 1834 o English
- 1835 o Spanish
- 1836 o Mandarin
- 1837 o Cantonese
- 1838 o French
- 1839 o German

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The specific language requirement and associated work volumes will be specified in individual task orders issued by the Government. The Contractor shall incorporate all appropriate considerations for multi-language requirement into the support for each task including, but not limited to, areas such as training, quality monitoring, supervision, and automated services.

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C.5 FACILITIES TO BE PROVIDED

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C.5.1 General

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The Contractor shall provide adequate facilities to support the contact center operations, including, but not limited to the following:

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- o Work areas,
- 1858 o Employee lounge areas,
- o Storage areas,
- o Training and conference facilities with supporting audio and visual equipment,
- o Telecommunications and computer facilities,
- o IS work stations, including modular and/or other furniture and chairs,
- o File cabinets and file storage systems,
- 1864 o Lighting and office appliances, and
 - o Other required office furnishings.

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The Contractor is responsible for the ongoing maintenance, upkeep, and management of the contact center facilities. For security purposes, the Contractor shall generally be prohibited from identifying the facility(ies) as supporting Government business on either the exterior building walls or signage. Specific approval to do so can only be granted by the Contracting Officer.

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C.5.2 Facility Infrastructure

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The Contractor shall be responsible for the acquisition, installation, and maintenance of all cable, wiring and support infrastructure required to operate the facility, including, but not limited to: cable distribution systems; conduits; terminals and connectors; raised flooring; and other equipment needed to interconnect and support the contact center systems and operations.

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18801881 C.5.3 Site Selection and Facility Design Requirements

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When selecting and/or designing contact center site, the Contractor shall factor in the following:

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- The site selected shall provide a geographic location chosen to minimize the effect of catastrophic 1886 weather conditions on customer contact center operations. For multi-site solutions, the sites shall be spaced located in different geographic locations to minimize the possibility of adverse weather 1887 1888 conditions affecting the operations
 - The site shall be located at a safe location deemed appropriate for contact center operations.
 - o The site shall be easy to access in terms of relative proximity to local air transportation and major air carrier services.
 - o The site shall be located within the United States unless specifically approved by the Government.
 - The site shall be designed and built to comply with all applicable state, local, and Federal Government standards and regulations, such as the Occupational Safety and Health Act (OHSA) of 1970, as revised, and the Americans with Disabilities Act of 1990. The site shall remain in compliance with such standards and regulations throughout the term of the contract.
 - The site shall be situated in a location where the local labor market can support the contact center size and the skill sets of the labor pool required to support the task requirements, including foreign language, subject matter expertise, and other special requirements that the programs may present. Considerations should include the degree of competition for the labor pool from other contact centers and related industries and its impact on recruiting and retaining contact center personnel.
 - o The site shall be designed to provide an office environment that is conducive to providing customer support, supporting private conversations, and facilitating communication among staff.
 - o The site shall be designed to provide space, furnishing, acoustic, lighting, and temperature environment that meets or exceeds contact center industry standards.
 - o The site shall be designed to accommodate modern telecommunications and computer systems and contact center furnishing.
 - o The site shall be designed to meet other environmental control standards that are in compliance with Federal, state, local, and industry standards.
 - The site shall be supported by an appropriately sized backup generator and a non-interruptible power supply.
 - o The site shall be designed to provide redundant, high bandwidth, high availability connections to the telephone network and the Internet.

C.5.4 Project Housing

The Contractor-provided workspace assigned to support specific tasks shall meet the following criteria:

o Contiguous workspace shall be provided for the entire complement of IS staff supporting a specific task within a given site.

- o Security of information is a key concern of the Government. The Contractor shall provide a secure facility with restrictive access to only those Contractor employees and authorized Government representatives who support specific tasks.
 - O Unless specifically authorized by the Government on an individual task order basis, hoteling of IS seats, whereby no specified grouping of seats is assigned to the task on a permanent basis, is not permitted.
 - O Contractor shall designate at no additional cost to the Government a non-exclusive space for an authorized Government representative, to work when onsite. The space shall include enclosed office space and workstation, computer and Internet access, telephone and modem lines, administrative support and services, and security. Transitory Government personnel shall be provided workspace if available.

C.5.4.1 Exclusive-Use Space

To meet specific program requirements, the Contractor may be requested to provide space for the exclusive use of one or more authorized Government representatives. Specific space requirements, if required, will be included in individual task orders.

C.5.5 Facility and Systems Access

The Contractor-provided facilities and systems shall be designed to provide physical and information access security with security monitoring and access restriction at all times. Access to the contractor-provided facilities shall be provided to authorized Government personnel at anytime during the normal operation of the contact center. Access to contractor provided systems, including remote access by Contractor employees and authorized Government employees, shall be restricted to authorized personnel at all time.

Designated Government employees, and/or their authorized representatives may visit any contact center facility used to support its programs without prior notice for the purpose of conducting on-site reviews, information gathering, or program observation.

C.6 TECHNOLOGY INFRASTRUCTURE TO BE PROVIDED

The contractor shall provide and maintain robust and scalable, state-of-the-art multi-channel contact center system hardware, software, and accessories to meet task order requirements. The Contractor shall provide a commercial off-the-shelf (COTS) solution that meets the Government requirements. The systems shall be adequately sized and equipped to handle fluctuations in the volume of inquiries received. The systems shall be configured such that they can be easily expanded to accommodate growth in work volume. The systems shall have adequate backup capability to maximize availability and reliability of all services. At a minimum, the system shall be Section 508 compliant and meet the requirements specified in Sections C.6.1 through C.6.15 below. Call processing and E-mail routing and management systems provided by the contractor shall incorporate automated capabilities to perform periodic checks on the systems to verify operational status of the contractor systems and alert contractor's system maintenance personnel and/or the Government if there is a failure.

Contact center staff shall be provided desktop workstations, including computers, telephones and headsets, and other equipment, software, and accessories required to sustain contact center operations.

Unless specified by the Government, all workstations shall be equipped with telecommunications, e-mail and Internet access.

C.6.1 Call Processing Technology and Services

Contractor shall provide the required call processing technology and services to handle the workload presented by the Government. These include, but are not limited to:

C.6.1.1 Call Routing and Distribution – The system shall provide routing/distribution of incoming calls based on sequence of arrival/origination, inquiry type, IS availability and skills, contact center availability, or other predefined routing instructions, as specified by the Government. The system shall provide at a minimum:

o The capability to monitor and visually display the work state and availability status of all ISs on a real-time basis.

o The capability to display call-handling statistics real-time.

 • The capability to provide electronic and hard copy reports on all trunks, IS, and workgroup performance statistics.

 o The capability to provide incoming calls by Dialed Number Identification Service (DNIS) reporting.

 o The capability to originate and least-cost route outgoing and follow up calls.

 • The ability to transfer calls within the contact center or to transfer calls to other locations via attended or unattended transfers.

 C.6.1.2 Automated Fax-Back/Fax on Demand – The system shall have the capability to allow customers to generate a request for a document to be automatically sent to their fax machine. This function can also be activated internally by a IS to send documents to a customer's fax machine.

2015 C.6.1.3 Automatic Numbering Identification (ANI) - Certain caller information, such as the caller's telephone number, may be used to identify the caller and access caller information to facilitate customer service and/or to support the compilation of caller demographic information. Numeric area code information shall be translated to reflect its corresponding geographic location (e.g., area code 202 would be reflected as Washington, DC) for reporting purposes. The contact center system shall be ANI-enabled and possess any additional software required to support such functionality.

C.6.1.4 Accounting and Management – The system shall provide accounting and management capabilities for all inquiry types.

C.6.1.5 Call Queuing – The system shall queue incoming calls and provide callers with an estimated wait time in queue and other recorded messages. The system shall provide the caller with an option to stay in queue or leave a message for callback based upon response to prompts. During or upon completion of the callback message, callers shall have the option of returning to the queue without losing his or her place in the queue.

2031 C.6.1.6 *Call Transfer* – The system shall be capable of transferring calls to a different workgroup within the contact center and/or to a workgroup located in a different contact center via blind or attended transfer, as specified by the Government. The call transfer function may be activated automatically by the

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- caller or manually through the IS. The Contractor shall provide the most efficient and cost effective way of transferring the calls unless otherwise directed by the Government. The system shall be capable of tracking the quantity and duration of calls transferred from one program to another program within the Contractor's system.
- 2039 C.6.1.7 Computer Telephony Integration (CTI) The system shall be capable of displaying caller-2040 relevant information at the IS workstations (e.g., via screen pop technology). The displayed information 2041 may be triggered by DNIS, and/or ANI information, and/or through information entered by the caller or 2042 IS, and/or through data gathered by the IVR service.
- 2044 C.6.1.8 *Dialed Number Identification Service (DNIS)* The system shall be DNIS-enabled, in order to distinguish incoming calls by the called number and route them to the appropriate response system and/or IS. The system shall be capable of providing the appropriate program identification (e.g., via whisper announcement) at the IS workstation.
- 2049 C.6.1.9 Automated Voice Response - The system shall be equipped with innovative and effective 2050 automated voice response solutions that enables the callers to obtain answers to frequently asked 2051 questions quickly and in a customer friendly manner. The solutions include the use of IVR, voice 2052 recognition and text-to-speech technologies. The system shall have the ability to quantify (aggregate by 2053 menu and message) the selections of callers by business and non-business hours and days for reporting 2054 purposes. The system shall accommodate callers with touch-tone and rotary telephones/dial pulse 2055 telephones who seek information via self service and/or assistance. 2056
- 2057 C.6.1.10 *TDD/TTY Calls* The system shall be equipped with Telephone Device for the Deaf (TDD) or TTY (ASCII) terminals for responding to inquiries from individuals who are hearing and visually impaired.
- 2061 C.6.1.11 System Capacity The Government requires that Contractor provides sufficient capacity on the system to support projected call volumes, workload estimates, and call routing in accordance with service level goals (e.g., blockage). The Contractor shall provide sufficient expansion capability to accommodate call pattern variations.

C.6.2 E-Mail Routing and Management

The contractor-provided e-mail routing and management system shall be integrated with the inquiry processing system described in Section C.6.1 to ensure efficient staff utilization. At a minimum, the system shall provide the following:

- 2073 C.6.2.1 *Time/Date Stamping of Receipt* automatically stamps the time and date of receipt of e-mail 2074 messages.
- 2076 C.6.2.2 *Auto Copy of Messages Upon Receipt* automatically forwards a copy of the e-mail 2077 messages to up to 3 Government-designated e-mail addresses immediately upon receipt. 2078
- 2079 C.6.2.3 Automated Inquiry Tracking Number Assignment automatically assigns a tracking number 2080 to each incoming e-mail message; provides a capability to automatically assign sub-tracking number(s), when prompted, for tracking e-mail messages forwarded to multiple agencies.

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- 2083 C.6.2.4 *Auto-Message Processing* monitors incoming mailboxes for incoming mail; automatically scans, filters, analyzes, sorts, categorizes, prioritizes, routes, queues, and responds to e-mail messages

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- based on predefined rules; includes spam control, auto-acknowledgement, content-driven auto-response, and external notification capabilities. The auto-acknowledgement and auto-respond features must be able to retrieve the e-mail address of the inquirer from a web e-mail form, an auto-forwarding e-mailbox, and/or free form e-mail and use it for responding to the inquiry. To the extent practicable, the e-mail system shall employ automated means to remove extraneous routing and other information from the response (rather than relying on manual action by the IS) before its transmission.
- 2092 C.6.2.5 *Automated Response Aids* provides storage and retrieval of customized and preformatted messages, automated response suggestions, spell-check, and auto-text insertion of commonly used words, phrases, and responses to enhance response efficiency.
- 2096 C.6.2.6 *Attachments/Web Links* provides the ability to receive e-mail attachments and send attachments and/or embedded web links with the outgoing e-mail message. 2098
- 2099 C.6.2.7 *Monitoring* allows customer support supervisors, managers, and up to 5 designated Government representatives from remote locations, to closely monitor message queues, agent activity, and performance levels; provides automatic escalation of messages that are past performance level thresholds.
- 2104 C.6.2.8 *Mail Tracking* allows off-site respondents to receive and respond to messages via their 2105 existing e-mail client, while maintaining full message tracking.
- 2107 C.6.2.9 Inquiry Tracking records and tracks all relevant information and disposition of all e-mail inquiries; provides problem-tracking functionality and is capable of recording and generating records of problems reported, tracking the problem through to resolution, and maintaining historical data on problems by the inquirer and by problem category and frequency. Case tracking database information shall be available to ISs for inquiry and real-time update as appropriate.
- C.6.2.10 *Management Reports* provides a full array of scheduled and ad hoc management reports in a commonly used electronic format that track e-mail volume statistics, category and agency breakouts, historical data, trends, case tracking, productivity and performance measurements. The reports shall include both summary and detailed data. The Contractor shall assure that the information on the reports can be grouped and sorted by the fields in the inquiry tracking database. Reports shall be accessible via a secure web site. The preferred delivery method will be through the use of XML.
- 2120 C.6.2.11 *Interoperability* The systems shall be able to exchange e-mail with Government e-mail systems. 2121
- C.6.2.12 Security security all required measures to ensure that the security of the e-mail and associated systems are not compromised (e.g. content checking, anti-virus, e-mail exploit detection and defense, and threats analysis).
- 2127 C.6.2.13 *Storage* provides sufficient capacity to store all incoming and outgoing e-mail messages, case tracking data, and other relevant information at a minimum for the current fiscal year and the previous fiscal year.
- C.6.2.14 *Mass Mailing* provides the ability to transmit information via e-mail to lists of recipients stored within the system in accordance to pre-established schedule and/or as directed in the task orders.

C.6.2.15 *Message Blocking* – provides the capability to automatically block e-mail inquiries sent from other than web form(s) designated by the Government from reaching the e-mail messaging system. This includes replies to the Contractor's responses sent by the inquirers using the "reply to" function.

C.6.2.16 Auto Copy of Responses – provides the capability to send a copy of the responses via bcc to up to 5 e-mail addresses at the time of the response.

C.6.3 FAQ System

The Contractor shall provide a reliable, scalable, and secure FAQ solution that provides the capabilities specified in Section C.3.1.11 of this SOW.

C.6.4 Knowledge Management System

The Contractor shall provide an integrated knowledge management system to store, organize, search and retrieve knowledge needed to respond to inquiries received via all communications channels, including those received through the hosted FAQ service. The service shall incorporate innovative self-learning or equivalent technology to analyze, organize, and present information to enhance the user's ability to effectively find information. At a minimum, the system shall have the following capabilities:

6.4.1 Real-time access to knowledge base via an easy-to-use secure web or equivalent interface for posting, updating, searching and retrieving information, including management reports by authorized personnel. Capability of sharing FAQ answers and information in the knowledge base with other systems and/or services through the use of XML.

6.4.2 Real-time and historical insight in the usage pattern and usefulness of the stored knowledge.

6.4.3 Real-time access to search and retrieve information via the Internet by the general public.

 6.4.4 Capability of automatically verifying the validity of internal and external links contained in the knowledgebase on a daily basis and notifying the Contractor of any invalid links. The link verification process shall not disrupt availability of the knowledgebase to end users.

C.6.5 Contact Management System

The Contractor shall provide a contact management system for capturing, tracking, assigning and managing all inquiries from initial contact through resolution, regardless of the access channel. The system shall include problem-tracking functionality and be capable of recording and generating records of problems reported via any channel, tracking the problem through to resolution, and maintaining historical data on problems by caller, tracking identification number, and by problem category and frequency. The system shall have the capability to capture blended channel communications in a single customer record. The system shall be available to all ISs for inquiry and real-time update as appropriate. The Contractor shall provide summary and detailed system and management data via secure web access. The system shall be capable of automatically extracting the relevant information from electronic inquiries populating the corresponding database fields via the use of XML.

The Contractor-provided contact management system must have the capability to track a wide range of data and activities, including personal data and customer demographic, contact logging and interaction,

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- 2185 nature of inquiry and disposition, and inquiry tracking information. Specific requirements to be 2186 supported will be identified in individual task orders. 2187
- 2188 The Contractor-provided inquiry tracking and management system shall provide functionality including, 2189 but not limited to the ability to:
- 2191 Capture, record, and document all customer inquiries and responses made to those inquiries 6.5.1 2192 whether via telephone, facsimile, E-mail, written correspondence, or any other communication channels 2193 supported. This includes date and time of receipt, nature of inquiry, information requested, disposition, 2194 response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow up action. 2195 The system shall also identify whether the inquiries are resolved by the Contractor or forwarded to 2196 Government personnel for resolution. 2197
- 2198 6.5.2 Retain a history of customer inquiries, interactions, and responses. 2199
- Support reporting requirements that include data and management information analysis. 6.5.3 Incorporate multiple sorting and reporting alternatives including, but not limited to: by case number, by 2202 caller name, by applicant name, by date, by disposition code, by inquiry type, by program, by method of inquiry receipt, by method of inquiry response, by frequently asked question (FAQ).
 - Provide the Government with the capability and support required to ensure uninterrupted access to the application outside of scheduled system maintenance periods.

C.6.6 Workforce Management System

The Contractor shall provide a multi-channel workforce management system that will enable management personnel to analyze historical work volume, employee availability and schedule preferences, and trends to accurately forecast and schedule staffing resources to meet work volume requirements. The system shall be able to generate staff shift schedules based on traffic, staff availability, and service objectives. The system shall have the capability to optimize the schedule for skill-based routing.

C.6.7 Customer Survey Automation

The Contractor shall provide the capability to survey callers in an automated fashion for purposes of customer satisfaction assessment. The system shall provide the means to capture and transcribe the comments for analyses. The system shall be capable of capturing, storing, aggregating, and reporting survey results. All surveys shall be conducted in accordance with rules prescribed by the Government as defined in individual task orders (e.g. no surveying of calls placed for emergency purposes, surveys not offered to the same caller more than x times in x months).

C.6.8 Compliment and Complaint Management

The Contractor shall provide an automated capability to gather and report on customer complaints, compliments, and other service related comments/suggestions. The system shall provide the means to capture and transcribe the comments for analyses

C.6.9 Service Monitoring and Quality Control

The Contractor shall provide the capability for performance monitoring from a remote location. Supervisory and quality control personnel shall be able to monitor the performance of the ISs without plugging into the IS telephone sets. The monitoring system shall allow for silent monitoring both with and without tone indication to the IS during monitoring. The system shall have the following capabilities:

6.9.1 Monitoring sessions that can be scheduled and recorded for later review by supervisory and quality assurance personnel

6.9.2 Monitoring system that can record the voice and data portions of the transaction

6.9.3 All calls recorded for quality monitoring purposes shall be retained for a 90-day period, at a minimum, and permit tracking of IS actions in securing the response. The monitoring mechanism should permit calls recorded in sufficient quantity to allow for random selection of calls for review..

6.9.4 Remote access for monitoring by authorized Government personnel.

C.6.10 Training

The Contractor shall provide audio and visual equipment, computer workstations and servers, and other training aids to facilitate training of contractor staff.

C.6.11 Literature Fulfillment

The contact center system shall be capable of generating transactions fulfilling information requests (e.g., postal mail, E-mailing or facsimile of forms or information booklets) and relevant communications with customers. The system used for this function shall incorporate an alert process that notifies the appropriate resource to open and process requests as they are received. The contact center shall use laser-quality printers to provide the capability to print letters, product information, or other relevant information in black and white and/or in color. Contractor shall also be capable of electronically tracking the request through fulfillment.

C.6.12 Voice Mail and Electronic Mail

The contact center system shall be equipped with voice-mail and electronic mail capabilities to support internal and external communications. The Contractor shall provide E-mail accounts and addresses and Internet access for receiving and responding to customer inquiries at the contact center.

C.6.13 Online Ordering System

The Contractor shall provide a reliable, scalable, and secure Online Ordering solution that the Government can link to from subscribing websites to allow users to order products and services from the Government. The user interface shall be user friendly, be configurable to provide similar look and feel as the subscribing website, be compatible with commonly used browsers, and be Section 508 compliant. At a minimum, the contractor online ordering system shall have the following capabilities:

- 2285 o Ability to capture and store user-entered data in Government-specified formats and deliver batch orders to Government-specified location via secure protocol on a scheduled basis.
- 2287 o Ability to post orders/reports via a secure FTP site.
- 2288 o Provides a shopping cart feature to enable user to review order information, delete items and/or change quantities before submitting the order.
- 2290 o Ability for user to easily print order receipt.
- 2291 o Provides address verification and can automatically correct addressing mistakes made by the user.
- 2292 o Ability to assigns unique order ID to each order.
- 2293 O Allows inventory reports to be generated at any time
- 2294 o Accepts payments through commercial credit cards in a secure manner

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C.6.14 Web Chat System

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The Contractor shall provide a reliable, scalable, and secure Web Chat solution that the Government can link to from subscribing websites to access real-time web chat service.

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The user interface shall be user friendly, be configurable to provide similar look and feel as the subscribing website, be compatible with commonly used browsers, and be Section 508 compliant. The services shall enable an IS to provide near real-time assistance to multiple users at the same time span. At a minimum, the contractor web chat system shall have the following capabilities:

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- o Ability to route inquiries to specific queue based on agent skills.
- 2308 o Ability to push active web pages to end users
- 2309 o Allows IS to guide end users through a website or application.
- 2310 o Provides access to knowledgebase and preformatted responses to facilitate inquiry response
- 2311 o Allows users access to knowledgebases to enable them to find answers while waiting in queue
- 2312 o Provides automated greetings and responses
- 2313 o Provides real-time monitoring capability
- O Ability to track response and transaction time for each session and exchange
- 2315 o Provides real-time and historical management reports on chat sessions and activities
- 2316 o Ability to send copy of the session transcription via e-mail to the user and/or the Government
- O Ability to enable users of the chat service to copy and/or print the content of the entire chat session onto an electronic or print media.

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C.6.15 Power Supply

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The Contractor shall provide emergency electrical power generation capability, as well as an uninterruptible power supply (UPS) to ensure continuity of contact center operations. The UPS shall be capable of protecting systems from voltage lags, over-voltage conditions, line frequency fluctuations, and power blackouts. It shall be capable of sustaining operations in the event of loss of normal sources of

power until the backup generators can come online. The backup generator shall be capable of sustaining full contact center operation for a minimum of 24 hours. The transition from normal to emergency to backup power shall occur without loss of power to systems and without the disconnection of calls in process, loss of data, or customer calls queued for service.

C.6.16 Database Design

All database design shall conform to industry standards and conventions and shall be capable of sharing data with other Government/contractor systems through the use of XML. Any such databases shall be capable of sustaining a heavy query transaction load without impacting required system response requirements. These databases shall be designed and implemented to provide continuous read/write access during the Project required availability times. Maintenance cycles may restrict access as long as they are of short duration, scheduled outside of normal business hours and coordinated and approved by the Government.

C.7 TELECOMMUNICATIONS SERVICES TO BE PROVIDED

C.7.1 Local Telecommunications Services and Internet Access

The Contractor shall provide the required local exchange carrier (LEC) and Internet access services to meet task requirements.

C.7.2 Intercity Telecommunications Services

The Government may provide its own intercity telecommunications services as Government Furnished Equipment or request the Contractor to provide the services as part of the overall solution.

Government furnished intercity telecommunications services may include domestic and international toll-free services and outbound intercity telecommunications and dedicated transmission services (between the contractor facility and Government location(s)) furnished through the Federal Government's long distance carrier and other contracts. Dedicated transmission services between contractor facilities shall be provided by the Contractor. Intercity telecommunications services provided by the Government may include the following features:

- o Domestic and international toll-free services with nation-wide single number coverage and call routing features (e.g. area code routing, time of day and day of week routing, percent allocation routing, area code routing, allocation routing, alternative routing)
- o Call termination features (e.g. network call transfer, dialed number identification service (DNIS)
- 2368 o Automatic number identification (ANI)
 - o Automated voice response service (e.g. IVR, voice recognition)
- 2370 o Outbound long distance service
 - Management reports

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When requested, the Contractor shall provide the necessary intercity telecommunications services to meet the needs of the Government. At a minimum, the Contractor shall provide services and features

equivalent to those described in this section. The Contractor shall price telecommunications services separately in Section B to enable the Government to select the optimum solution. The Government may change service provider at any time during the effective period of a task order if such a change is in the best interest of the Government. The Contractor will be notified in writing if such a change is to occur.

C.7.3 Network Design

The Contractor shall be responsible for the overall network design, traffic engineering, and meeting the interface requirements of all telecommunications and Internet access services needed to sustain both the voice and data requirements of the contact center operations. This requirement includes supporting data transmission between the Contractor and Government systems and appropriate security mechanisms to protect sensitive data.

C.7.4 Network Termination Equipment

The Contractor shall provide any equipment necessary to terminate the telecommunications and Internet access services to the contact center, including any inside wiring and connectors between the network service demarcation point and the contact center system.

C.7.5 Service Coordination

The Contractor shall be responsible for coordinating with the Government's telecommunications contractors and/or other telecommunications service provider(s) for service provisioning, trouble resolution, and service restoration.

C.7.6 Telephone Number Ownership

The Government may furnish its own toll-free telephone number(s) for use by the Contractor or request the Contractor to provide the toll-free telephone number as part of the solution. The Contractor shall expedite transfer of all toll-free telephone number(s) used to support tasks issued under this contract to the Government at the conclusion of each task.

C.7.7 Internet Domain Ownership

The Government may furnish its own Internet domain(s) for use by the Contractor or request the Contractor to provide the Internet domain(s) as part of the solution. The Contractor shall expedite transfer of all Internet domain(s) used to support tasks issued under this contract to the Government at the conclusion of each task.

C.8 Human Resources Management

The Contractor shall develop and implement an effective Human Resources Management program to support recruitment, training, and retention of qualified personnel needed to meet task requirements. The

Contractor shall schedule and manage the contact center workforce to ensure adequate staffing is available to meet workload requirements.

C.8.1 Recruitment and Retention

The Contractor shall develop and implement an effective program to ensure timely recruitment and long term retention of qualified personnel to support task order requirements. At a minimum, the program shall address corporate human resources support, recruitment sources, testing and qualification processes, retention techniques and incentives, and employee satisfaction.

C.8.2 Training

The Contractor shall develop and implement a comprehensive training program that shall ensure that contact center staff provides superior levels of customer service across all customer access channels. Training courses shall provide participants the opportunity to develop skill levels in comprehensive customer contact and subject knowledge, and shall be provided through both classroom instruction and technical on-the-job training.

On a task order basis, the Government and the Contractor shall work together to jointly develop initial training. The Government will provide content-unique and organization-specific material as part of initial training. The Contractor shall provide customer service skills, equipment, database(s), and policy/procedure training. The duration of the training will vary depending on the task requirements. The training shall be both classroom and hands-on, computer-based and should include, at a minimum, working with databases and applicable Government furnished systems. The training shall be conducted at the Contractor's facility, and the Contractor shall bear all related costs.

C.8.2.1 Training Curriculum

Contractor shall construct training coursework and materials to address specific learning objectives of various groups. All training coursework and materials are to be approved by the Government prior to presentation to contractor personnel. The training curriculum shall include the following minimum components:

C.8.2.1.1 *Information Specialists* –Training programs shall be developed from the premise that all new staff has little or no contact center experience. The courses shall provide participants the opportunity to develop skill levels in telephone etiquette, listening, problem-solving, verbal and written communication, managing stress, working in teams, and other course modules related to foundational customer contact and human interaction skills. The Contractor shall ensure that ISs are adequately trained in the handling of calls from: non-English speaking individuals; individuals who are hearing, speech, or visually impaired; individuals with low literacy ability; irate and/or abusive callers; callers in crisis situations; and any other caller diversity issues that may be identified. In addition, training shall be developed to educate ISs in the terminology, services, laws and regulations (e.g., Privacy Act), systems, and protocols specific to the task requirements.

C.8.2.1.2 *Leadership* – Courses shall provide participants with an overview of project goals and objectives, performance goals (e.g., quality, and productivity) and contact center management (e.g., operations, and service level). Participants shall be provided the opportunity to develop skills in coaching, team-building, time management, problem solving, and other course modules related to human

2474 performance management. In addition, training shall be developed to educate the leadership team in the 2475 terminology, services, systems, and protocols specific to the task requirements.

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C.8.2.1.3 Support Personnel – Courses shall provide participants with an overview of project goals and objectives. Participants shall be provided the opportunity to develop specific skills relating to their areas of expertise including, but not limited to, supervision, training, quality, service level management, and technical support. In addition, training shall be developed to educate support personnel in the terminology, services, and protocols specific to the task requirements.

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Contractor shall also include enhanced training modules to inform staff of Government organizational structure and agency missions, applicable laws and regulations, new or modified programs and/or service offerings specific to the task requirements.

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C.8.2.2 **Training Facilities**

2488 Contractor shall provide all training facilities, computer terminals (including desktop content, functionality, and connectivity), audio and visual equipment, and other materials/supplies necessary for training as well as appropriate workspace for students. The Contractor shall design the training facilities to provide training in an effective and efficient manner. The Contractor shall provide the storage space for all course materials and references.

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C.8.2.3 **Instructor and Classroom Criteria**

The Contractor shall provide certified instructors to deliver all training provided under this contract. The training is to be provided at Contractor-provided facilities that are designed for optimum learning with effective student-to-instructor ratio and class size limits.

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Government personnel will be available during start-up to provide content knowledge training for the start-up ISs and/or conduct train-the-trainer style learning sessions with Contractor's training instructions for course modules. Additionally, the Government may make personnel available to provide initial and/or regularly scheduled (e.g., biannual) task-specific training sessions with Contractor's staff.

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C.8.2.4 **Course and Reference Materials**

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by the Government, including but not limited to, program background, laws and regulations (e.g., Privacy Act), services, work types, policies and procedures, and related systems. Specific materials to be provided will be included in individual task orders. Contractor shall develop or revise training materials as necessary to accommodate such changes, keeping all training materials up-to-date for the duration of the contract. All training coursework and materials are to be approved by the Government prior to presentation to contractor personnel.

The Contractor shall develop the course materials based on relevant information and materials provided

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Contractor shall ensure that updates to training materials are carried over to applicable ancillary reference materials, job aides and supporting processes inclusive of contact center operations, quality assurance, and information systems (e.g., Contractor-provided knowledge database).

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Prior to task implementation, Contractor must provide the Government with a copy of task-specific training materials for review and approval and with a copy of all other training materials to be delivered under a specific task order for review only. Contractor shall provide a copy of the most recent training materials upon request by the Government at any time during the performance of the task.

2522 C.8.2.5 Reporting and Recordkeeping

The Contractor shall maintain a comprehensive list of contact center employees who have received training and/or obtained certification, including the frequency of training, types of training, and results of training. The Contractor shall maintain copies of all training records and reports for the duration of the contract.

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C.8.2.6 Training Metrics and Analysis

The Contractor shall provide training metrics and analysis, including, but not limited to the following tasks:

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Measure IS classroom training performance by a combination of written tests and job-simulated exercises at the level of baseline performance goals for new ISs and target performance goals for experienced ISs.

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o Analyze the results of IS training performance measures.

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o Measure training effectiveness and performance of the instructor(s) by third party analysis or student survey.

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o Revise the training program based on the results of IS and instructor performance metrics, focusing on those ISs for whom additional/modified training may be indicated.

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C.9 QUALITY ASSURANCE/QUALITY IMPROVEMENT

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The Contractor shall develop, implement, and manage a Quality Assurance/Quality Improvement Program to ensure that services delivered comply with the performance standards specified by the The program shall include on-site and remote service monitoring capabilities and performance analysis to support planning and operation of the contact center on an ongoing basis. The program shall also include regular call calibration sessions to ensure all its quality professionals define and perceive customer interactions in the same way. Calibrated quality professionals shall monitor each full time IS assigned to specific programs a mutually agreed upon number of times and shall prorate monitoring sessions for part time employees so that they receive the same level of monitoring as do fulltime employees. For each IS, quality professionals shall schedule monitoring sessions at various times of the day and various days of the week to ensure a fair representation of IS performance (e.g., monitoring back-to-back calls for a single IS would not be acceptable). The Contractor and the Government will mutually agree upon the criterion for calibration. Upon task order award, the Government and Contractor shall schedule and conduct calibration sessions to reach the acceptable criterion for calibration. Evaluations conducted by quality professionals shall be available to the Government both in an individual and an approved consolidated report format. The Government requires that Contractor documents in detail the data, results, conclusions, recommendations, action plans, and improvement priorities identified as a result of quality monitoring. Contractor shall ensure legal and regulatory compliance concerning notification and consent when monitoring calls for quality purposes and shall verify that call monitoring complies with all applicable Federal, State, and local laws and statues.

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C.9.1 Service Monitoring and Calibration

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The Contractor shall provide on-site and remote service monitoring and performance analysis to support planning and operation of the contact center. Contractor shall develop a comprehensive service monitoring plan, including, but not limited to, the following components:

Monitoring processes - Contractor shall develop and implement a continuous performance-monitoring program to ensure that ISs are performing in accordance with the performance standards defined by the Government as specified in individual task orders for all communications channels. Contractor shall devise methods for: capturing time, date, application name, and comments for the inquiries monitored; tracking and trending by IS, supervisor, manager, and application; reporting for training need, individual and operational performance issues, and hiring considerations; and communicating monitoring results to ISs and other operational areas within the contact center to ensure continual performance and process improvement. At the request of the Government, monitoring sessions may be held jointly.

Monitoring system - Contractor shall utilize an automated inquiry monitoring and recording system with remote access. The Contractor shall have the capability to monitor both voice and data capabilities. Should data capabilities not be available, a description will be required to explain how the Contractor monitors and evaluates the accuracy of information both provided and recorded by the ISs. The Government reserves the right to remotely monitor Contractor's ISs at anytime without pre-arrangement and to contract with a third party to remotely monitor Contractor's ISs. The Government will provide input to the Contractor concerning remotely monitored inquiries.

Calibration - Contractor shall ensure all its quality professionals define and perceive customer interactions in the same way. Calibrated quality professionals shall monitor each full time IS assigned to specific programs a mutually agreed upon number of times and shall prorate monitoring sessions for part time employees so that they receive the same level of monitoring as do full-time employees. For each IS, quality professionals shall schedule monitoring sessions at various times of the day and various days of the week to ensure a fair representation of IS performance (e.g., monitoring back-to-back calls for a single IS would not be acceptable). The Contractor and the Government will mutually agree upon the criterion for calibration. Upon task order award, the Government and Contractor shall schedule and conduct calibration sessions to reach the acceptable criterion for calibration.

Continual process improvement - To improve operations, Contractor shall develop and implement action plans based on analysis of monitoring results. These plans shall be available to the Government for review upon request. In addition, evaluations conducted by quality professionals shall be available to the Government both in an individual and an approved consolidated report format. The Government requires that Contractor documents in detail the data, results, conclusions, recommendations, action plans, and improvement priorities identified as a result of quality monitoring.

The Government will work closely with the Contractor to determine which customer calls shall be recorded for monitoring purposes.

C.9.2 Effectiveness of Service Delivery

The Contractor shall provide measurements and analysis of the effectiveness of service delivery including, but not limited to:

C.9.2.1 Accuracy of information provided – Perform regular assessments of the accuracy of information provided by ISs to the inquirers. Such assessments shall be conducted through regularly-scheduled call and other work-type monitoring. The Contractor shall report the results of the assessments to the Government in accordance with task order reporting requirements.

C.9.2.2 Accuracy of information recorded – Perform regular assessments of the accuracy of data and information collected and recorded by ISs. Such assessments shall be conducted through regular-

scheduled call and other work-type monitoring. The Contractor shall report the results of the assessments to the Government in accordance with task order reporting requirements.

C.9.2.3 Customer satisfaction assessments – Design develop, and implement customer satisfaction surveys in conjunction with Government personnel to measure the performance level of the Contractor-provided services. Obtain all appropriate approvals in compliance with Federal regulations and statutes prior to initiating any survey activities. The Contractor shall use the results of the customer satisfaction assessment to determine customer perceptions about the quality of the service delivery, IS system performance, and the overall process of service fulfillment. Contractor shall use these results to develop and implement action plans to continually improve customer satisfaction, and shall provide the results of both the survey and action plans to the Government for review upon request.

C.9.2.4 *Employee satisfaction assessments* – Develop and implement a continuous program both to monitor employee satisfaction, assess employee job needs, and to determine employee perceptions about the quality of the support provided by Contractor and the operational environment. Provide the results of the assessments (including prioritized recommendations) to the Government for review upon request and cooperate with the Government to devise action plan to target any suggested improvements, including required actions, responsibilities, and timeframes.

C.9.3 Quality Improvement Program

The Contractor shall develop, implement, and manage a Quality Improvement Plan that incorporates customer-focused initiatives into the contact center solution, including, but not limited to:

C.9.3.1 Compliment and complaint management – Contractor shall have an automated Compliment and Complaint Management process to capture customer service information regarding areas of service issues and customer need. Contractor shall compile and analyze such data, identifying market opportunities or opportunities for improvement where appropriate, and reporting such information to the Government on a monthly basis.

C.9.3.2 *Employee suggestions* – Contractor shall conduct regular surveys to collect ideas from ISs for improving customer satisfaction. This input shall be provided to the Government on a monthly basis. The Government will use this information in their efforts to improve customer satisfaction. For those areas related to Contractor's performance, Contractor shall develop and implement action plans to continually improve customer satisfaction and shall make these plans available to the Government upon request.

C.9.3.3 External operational assessments – Contractor shall permit the Government, and/or a Government authorized third party, to conduct, at the Government's expense, operational assessments of Contractor's operations to determine the quality of service delivery, the quality of IS system performance, and the efficiencies of the operations. Operational assessment includes a validation and an audit of the contact center. It may include organizational and training assessments as well as other task-related activities performed by the Contractor. The purpose of these assessments is to gain information concerning the operation, identify opportunities to support improvements of contact center operations, and opportunities for the Government to support Contractor. The Contractor shall cooperate fully in any such review, provide the Government (or designated third party) with information, and explain Contractor's procedures and operations to the Government, if necessary. The Government will provide Contractor feedback on the results of any operational assessments. The Government and Contractor shall

identify high-priority recommendations, and cooperate to develop and implement action plans that target high-priority improvements.

The Government intends to establish performance standards that will be used to measure contractor

performance and a methodology for calculating incentive awards for superior performance on a task order-by-task order basis. The Government will consult the Citizen Services Level Committee (CSLIC)

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C.10PERFORMANCE MANAGEMENT

report "Proposed Performance Measures, Practices and Approaches for Government-wide Citizen Contact Activities when developing individual task order performance standards. Specific performance standards, incentive award schedule, and methodology for calculating incentive award amount will be identified in 2685 individual task orders issued by the Government. The Contractor is expected to work with the 2686 Government to develop plans and procedures for implementing new or revised performance standards.

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C.11 MANAGEMENT REPORTS

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The Contractor shall provide for the automatic generation of comprehensive, accurate, easy to understand, and timely reports. The Government intends to request and receive only those reports that provide insight to the Contractor's level of performance in meeting contractual requirements and satisfying customer needs. The Government may also request the Contractor to provide management and operational reports on an ad hoc basis for purposes of gaining insight to specific program and customer service needs. The Contractor shall provide management reports via e-mail or a secure web site for remote access and download via the Internet. Access to these reports shall be controlled via User Identification Code and Unique Password. When requested by the Government, the Contractor shall provide these reports in electronic and/or hard copy format. Specific report formats, content, frequency, and delivery methods of all reports shall be coordinated with and approved by the Government on an individual task order basis.

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C.11.1 **Weekly and Monthly Status Reports**

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At a minimum, the Contractor shall provide weekly and monthly status reports. These reports shall be brief, factual, and shall include, but not be limited to:

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Management summary - shall document major events or problems and progress in their resolution.

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Continual improvement opportunities - shall document input received from Contractor's ISs concerning ideas for improving customer satisfaction.

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Narrative - shall describe work performed during the reporting period and work expected to be performed in the next reporting period, including assessment of Project status against schedule/plan, discussions of any problems, issues, change requests, recommendations for correction, and variances between Contractor billed versus proposed pricing where applicable.

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Operational Reports C.11.2

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The Contractor shall provide operation reports that provide a recap of key contact center activities in support of each task. Reports shall provide information by individual programs and in aggregate.

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Such reports shall provide detail sufficient to reflect the level of effort provided. The reports shall be supported with measurements occurring by second, minute, hour, or day, as appropriate. Activity reports

shall include hourly, daily, weekly, monthly, and annual trending of key data elements in both tabular and graphic formats.

Specific data elements appropriate to each work type including responses handled via automated services, inbound and outbound calls, incoming and outgoing facsimiles, incoming and outgoing E-mail messages, incoming and outgoing written correspondence, volume of escalated inquiries, and hosted FAQ services activities shall be included. At a minimum, the reports shall provide all relevant information on volume and disposition of inquiries by work type, call origin by area code and/or geographic area if available, performance statistics (e.g., call attempts, blockage, speed of answer, abandonment rate, holding and call wrap-up time, etc.), and IS occupancy rate. Specific data elements, formats, and data collection and reporting intervals shall be coordinated and approved by the Government.

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The Government reserves the right, during and for a 3 month period immediately after the Start-Up Phase of each task, or in cases of special circumstances/crisis situations, or non-performance, to request more detailed and more frequent reporting at no additional cost to the Government. In cases of non-performance, the Government may request such reports until such time as Contractor performance levels have stabilized and are in full compliance of contract requirements.

C.11.3 Problem Resolution Reports

In support of each task, the Contractor shall collect and compile a list of customer requests for information, services, or fulfillment literature that the Contractor is unable to answer or provide given the tools and data at its disposal. Such reports shall include both detailed and consolidated data and reference the specific information or item requested. The reports shall provide an explanation of how these inquiries were handled and/or resolved.

C.11.4 Monitoring Reports

In support of each task, the Contractor shall compile the results of call and work monitoring efforts including monitoring results, conclusions, recommendations, action plans, and improvement priorities. Such results should include both accuracy of information provided and accuracy of information recorded. These results shall be available in both individual and consolidated report formats.

C.11.5 Compliment and Complaint Management Reports

In support of each task, the Contractor shall gather and report customer comments to the Government on a monthly basis. At a minimum, this report shall include a categorization and tally of comments received according to predefined disposition codes, verbatim customer comments as captured by the automated survey equipment or IS, or the actual document from which they were received, and an analysis and trending of the type and quantity of comments recorded over the life of each task.

C.11.6 Ad Hoc Reports

In support of each task, the Contractor shall provide up to twelve (12) ad hoc reports annually at no additional cost to the Government. Such requests will be initiated and approved by the Contracting Officer or his/her duly authorized representative. The Government reserves the right, during initial project implementation or in cases of non-performance, to request more detailed and more frequent reporting at no additional cost to the Government until the need for such reports subside or Contractor performance levels have stabilized and are in full compliance of contract requirements.

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C.12 GOVERNMENT FURNISHED PROPERTY

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The Government will furnish pertinent information to the Contractor for use in the performance of each task. Examples of information that may be provided by the Government include, but are not limited to, the following:

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- o Privacy Act guidelines
- 2781 o Escalation procedures and guidelines
 - o Business rules and/or response formats and guidelines
- 2783 General Government and program specific training materials
- 2784 o Existing methods and procedures manuals
- 2785 o Government agency contact listing
- 2786 o Government travel guidelines
- 2787 Contact listing for Congressional and Diplomatic offices
- 2788 Existing script or call guides as presently used to support current agency programs
- o Federal information systems security guidelines
- o Screen layout and file structure for data transmitted by agencies
- 2791 o Access to Government databases where applicable
- 2792 o Public distribution materials (e.g., publications, applications, forms, brochures) where applicable.
- 2793 o Initial content for knowledge database
- 2794 o Conflict of interest guidelines
- 2795 o Relevant laws, regulations, policies and procedures
- 2796 o Reference materials
- 2797 o Database files
- 2798 o Envelopes and mailing supplies

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For any materials to be distributed to the inquiring public, the Contractor shall be responsible for stocking adequate supply and submitting re-supply requests on a timely basis to ensure continuous availability.

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C.13 DOCUMENTATION TO BE PROVIDED

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The Contractor shall provide the documentation in accordance with the schedule set forth in task orders issued by the Government. Identified below are some of the plans that the contractor is expected to provide as part of the task deliverables. The Contractor shall review all plans on a continual basis throughout the life of the contract in order to maintain their accuracy and appropriateness to the current operating environment. Subsequent to their initial acceptance by the Government, any changes to these plans shall require Government review and approval prior to their implementation. The Government reserves the right to require additional documents to meet specific task requirements.

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- 2814 C.13.1 Conflict of Interest Compliance Plan identifies plans and procedures to identify, evaluate, and mitigate all actual, apparent, and potential conflicts of interest that preclude or would appear to preclude the Contractor from rendering impartial assistance or advice.
- 2818 C.13.2 *Customer Satisfaction Plan* identifies plans and procedures to survey customers to determine the degree of customer satisfaction on the services rendered. The plan shall include details on the processes and methodologies that the Contractor will use to identify problems and implement corrective actions.
- 2823 C.13.3 *Design, Engineering, Implementation and Management* Plan includes the following: 2824
- 2825 C.13.3.1 Site Selection identifies processes, methodologies, and criteria used for site selection, including those that affect staffing, foreign language support, and emergency/disaster recovery.

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- 2828 C.13.3.2 *Facilities identifies* and defines the contact center design, including work and office space and training facilities.

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- C.13.3.3 *Technology* identifies and defines the system architecture and configurations for both primary operation and backup systems, including those supporting automated and manual inquiry processing, workforce management systems, knowledge/inquiry tracking databases, quality monitoring and training systems, management reports and other support tools used to support the contact center operations. Defines the use of XML within the system architecture to maximize data sharing with other Government/contractor systems.
- 2838 C.13.3.4 *Networks* identifies and defines the telecommunications/Internet services and most cost effective network design for supporting the contact center operations.
- 2841 C.13.3.5 *Operations* identifies processes and procedures for managing automated and attended functions, automated voice response script design and maintenance, call routing design and management, workforce scheduling and management, and service delivery strategies.
 - C.13.3.6 Disaster Recovery/Contingency Plan identifies every risk as well as the steps necessary to prevent it from happening in the first place. The plan shall include an alternate set of steps to minimize the impact should prevention fail. The plan must define backup and restoration processes and the precise steps to take to recover as quickly as possible, including recovery procedures for physical facility, voice, data, and desktop systems and applications, communications networks, electrical service, customer access points, partners and procedures and staff. The Plan shall define the roles and responsibilities of contractor personnel during contingent and disaster events, including plans for training the personnel to prepare them to respond to such events. The plan shall include implementation procedures to test and execute the plan on a regular basis to ensure preparedness for such events. The plan shall be developed in accordance with applicable agency IT Security Policy and NISI Special Publication 800-34, Contingency Planning Guide for Information Technology Systems.
 - C.13.3.7 *Human Resources Management Plan* includes the following:
- 2859 C.13.3.7.1 Staffing identifies staffing resources for contact center operation and project management. The plan shall include a staffing chart that identifies the allocated resources (expertise and staff hours) needed to perform each of the required functions to support the project. The plan shall include relevant details on recruiting and retaining employees, workforce scheduling and workload management, supervision and quality monitoring practices. The Plan shall also address roles and

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- responsibilities of project and contact center staff by title and define supervisor and Quality Assurance (QA) monitor to IS ratios that will be used in support of the task.
- 2867 C.13.3.7.2 *Training* identifies plans, procedures, and methodologies for training contact center 2868 employees, including the types and schedule of training to be provided, and criteria for selecting instructors and training evaluation assessment methods.
- 2871 C.13.3.7.3 *Dismissal Procedures* identifies procedures that the Contractor shall follow in the event of a Federal Government closure or other emergency affecting the area in which the contact center is located.
- 2875 C.13.3.8 *Knowledge/Case Management Plan* identifies methodologies, processes and procedures for effective knowledge management, including those required for developing, operating, and maintaining the required knowledge and case management databases to support the contact center operations. Where appropriate, the plan shall include methodologies and procedures for effective management of distributed knowledge databases and sharing of knowledge/case management data with other Government and/or contractor systems.
- 2882 C.13.3.9 Operations Management Plan identifies plans and procedures for managing staff, facilities, equipment and processes effectively; includes procedures that the Contractor shall follow in the event of a service outage, an unexpected surge in call volume, a Federal Government closure or other emergency affecting the area in which the contact centers is located.
- 2887 C.13.3.10 *Performance Management Plan* identifies plans and procedures to measure any customer service performance standards deemed appropriate.

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- 2890 C.13.3.11 *Phase-In Plan* identifies plans and approaches for implementing the proposed solution, 2891 including required tasks, schedule and milestones, and deliverables. The plan shall include 2892 methodologies and procedures for minimizing disruption of service to current customers. 2893
 - C.13.3.12 *Program Management Plan* identifies and defines the Contractor's organization, roles and responsibilities, and lines of authority, management procedures/policies/plans, plans and programs for managing team partners and subcontractors, escalation procedures for problem/dispute resolution, and reporting requirements for the tasks and services to be performed under this contract.
 - C.13.3.13 *Project Plan* provides a comprehensive plan for implementing the project, which addresses all strategies, objectives, required actions, roles and responsibilities and target dates for implementation of tasks. Identifies critical paths and task dependencies.
- 2903 C.13.3.7.14 Quality Assurance/Quality Improvement Program Plan – identifies plans, methodologies, 2904 and procedures for maintaining effective quality assurance and service improvement programs, including 2905 monitoring and assessing performance and service activities to ensure quality services are provided to 2906 customers. Included in the program shall be a Quality Improvement Plan to identify and document 2907 performance assessment and improvement opportunities and procedures for implementing the service 2908 improvements. The Plan shall address all areas, including, staffing, training, operations, contract 2909 deliverables, performance management, process engineering, service delivery, service improvements, and 2910 customer satisfaction.
- 2912 C.13.3.7.15 Security Plan provides an overview of the security requirements for the information and IT systems and describes the existing or planned controls (management, operational, and technical) for meeting those requirements. The Plan also describes the systems and delineates responsibilities and

- expected behavior of individuals who access the systems. The plan shall be developed in accordance with applicable agency IT Security Policy and NIST Special Publication 800-18, Guide for Developing Security Plans for Federal Information Technology Systems and other relevant publications.
- 2919 C.13.3.7.16 Service Level Management Plan identifies processes and methodologies for effective 2920 service level management, including workload forecasting, IS scheduling, service recovery (from system 2921 failures, disasters, etc.), problem identification and resolution, problem notification, and contingency 2922 planning and escalation.
- 2924 C.13.3.7.17 *Test and Acceptance Plan* identifies plans and procedures that the contractor shall use 2925 to ensure that the full range of services to be provided are successfully tested prior to actual implementation. 2927
- 2928 C.13.3.7.18 *Value Engineering/Process Improvement Plan* identifies plans and procedures to evaluate new and emerging technologies and/or reengineering business processes to improve program efficiency and customer service.

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- Additionally, the Contractor shall obtain and provide all permits, contracts, copyrights, licenses, etc., necessary for its performance of any tasks issued under this contract and shall provide copies of such information to the Government upon request.

SECTION D			
PACKING AND MARKING			
D.1 PRESERVATION, PACKAGING AND PACKING			
All reports shall be properly packaged to ensure against any possible damage resulting from improp handling, inclement weather, water damage, or excessive heat or cold to ensure acceptance by commo carrier for safe transportation to the point of delivery.			
D.2 PACKING LIST (GSAM 552-210-7) (APR 1984)			
A packing slip or other suitable shipping document shall accompany each shipment and shall show the (a) name and address of the consignor (b) name and address of consignee, (c) Government purchase order (d) Government bill of lading number covering the shipment, if any, and (e) description of the material shipped, including item number, quantity, number of containers, and package number, if any.			
D.3 FOB POINT			
All reports called for in the contract shall be shipped by the Contractor to the Government F.O.B. destination.			
D.4 SHIPPING INSTRUCTIONS			
Unless otherwise directed by the Contracting Officer or the Contracting Officer's Technical Representative (COTR), all reports shall be submitted in accordance with Section F of the contract.			

SECTION E

2963 <u>INSPECTION AND ACCEPTANCE</u>

E.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

This contract incorporates the following clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make a copy of the full text available. Also, the full text of a clause may be accessed electronically at this/these address(es): http://www.arnet.gov/far.

Federal Acquisition Regulation (48 CFR, APR 1984) Clauses

2974	Clause No.	Clause Title	Date
2975			
2976	52.246-02	Inspection of Supplies - Fixed Price	AUG 1996
2977	52.246-04	Inspection of Services - Fixed Price	AUG 1996
2978	52-246-06	Inspection of Services Time and Materials and Labor Hour	MAY 2001
2979	52.246-06	Inspection of Services Time and Materials and Labor Hour (ALT I APR 1984)	MAY 2001
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E.2 QUALITY CONTROL RESPONSIBILITIES

E.2.1 General

The quality control of services provided under this contract shall be based on: (i) operational requirements and standards contained in this contract; (ii) work performance; and (iii) productivity requirements and standards, and (iv) data base information resource development and maintenance standards.

E.2.2 Contractor Quality Control Responsibility

The Contractor shall implement and adhere to the quality control plan provided as part of its Technical Proposal. The quality control plan shall be written by the Contractor's Quality Control Manager and approved by his/her immediate supervisor.

The Contractor is solely responsible for quality control of services that it provides. The Contractor's quality control program, which is embodied in the quality control plan, shall include, but not be limited to, the following. A monitoring and inspection system covering all the services listed in the Performance Requirements Summary. It must specify the elements of work performance to be monitored and inspected, either on a scheduled or unscheduled basis; the methods to be used; frequency of monitoring and inspection; the format and content of records and reports to be generated; and the title(s) of the individual(s) who will perform the monitoring and inspection. It shall include, but is not limited to:

o the method for identifying and preventing deficiencies in the quality of services performed before the level of performance can become unsatisfactory;

o the administrative procedures to be followed for reporting to the Contracting Officer's Technical Representative (COTR); and for responding to operational problems or complaints concerning work performance, qualifications, or other complaints about Contractor personnel; and

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o preparation of system of on-site records of all inspections conducted by the Contractor and the corrective action(s) taken.

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This documentation shall be available to the Government at all times during the term of the contract. The Contractor shall provide to the COTR a detailed monthly summary of all quality control actions, including descriptions of events which require quality control activity, and the corrective action taken.

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E.2.3 Government Quality Assurance Responsibilities

3019 The Government will monitor the Contractor's performance using predetermined quality assurance 3020 surveillance procedures to examine and determine compliance with contract performance requirements. A 3021 copy of these procedures will be provided to the Contractor prior to the start of contract performance. In 3022 keeping with the Government's responsibility for quality assurance, the Government reserves the right to 3023 review all administrative, managerial, and statistical reports; telecommunications services; publicity 3024 materials and resource library materials using the Performance Requirements Summary. A copy of the 3025 Performance Requirements Summary will be provided to the Contractor prior to the start of contract 3026 performance. Final determination that reports, resource and publicity materials, and services rendered 3027 meet the requirements is solely the responsibility of the Government. All surveillance observations will 3028 be recorded by the Government. When an observation indicates defective performance, the Quality 3029 Assurance Evaluator (QAE) will request that the Contract Manager or designee initial the observation 3030 record. The Contractor shall, within 48 hours, notify the Contracting Officer, or his/her technical 3031 representative if so directed by the Contracting Officer, of the corrective action(s) taken in accordance 3032 with methods and techniques specified by the Contractor in its quality control plan. If the Contractor

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E.2.3.1 Performance Evaluation Meetings

The Contract Manager may be required to meet with the COTR, the QAE, and the Contracting Officer whether by telephone or at a designated Contractor-operated location on at least a weekly basis during the first month after the issuance of a Task Order under this contract. Meetings will be held as often as necessary thereafter at the discretion of the Contracting Officer or the COTR. However, a meeting will be held whenever a contract discrepancy report is issued. A mutual good faith effort will be made to

Performance Evaluation Meeting.

resolve all problems identified.

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The COTR will write the minutes of these meetings, and the minutes will be signed by the Contract Manager and the COTR. The attendee will, within three (3) business days, identify any areas wherein he/she does not agree by proving written notice to the COTR.

disputes any part of the OAE's observation, he/she shall request that the Contracting Officer hold a

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3048 3049 **SECTION F** 3050 **DELIVERIES OR PERFORMANCE** 3051 3052 3053 3054 **F.1** 52.252-2 **CLAUSES INCORPORATED BY REFERENCE (FEB 1998)** 3055 This contract incorporates the following clauses by reference, with the same force and effect as if they 3056 were given in full text. Upon request, the Contracting Officer will make a copy of the full text available. 3057 Also, the full text of a clause may be accessed electronically at this/these address(es): 3058 http://www.arnet.gov/far. 3059 3060 Federal Acquisition Regulation (48 CFR, APR 1984) Clauses 3061 3062 Clause No. Clause Title Date 3063 52.242-15 Stop-Work Order AUG 1989 3064 3065 3066 **F.2** PERIOD OF CONTRACT 3067 The contract becomes effective on Date of Award and continues in effect for a 2-year base period. In 3068 addition, the period of the contract is subject to four (4) two-year option periods at the prices provided for 3069 in Section B. 3070 3071 3072 F.3 OPTION TO EXTEND THE TERM OF THE CONTRACT 3073 The Government may exercise the options identified in Section F.2 by written notice to the Contractor 3074 within thirty (30) days prior to contract expiration. If the Government exercises this option, the extended 3075 contract shall be considered to include this option provision. 3076 3077 3078 **F.4** SCHEDULE OF DELIVERABLES 3079 Within thirty (30) days after award of a contract, the Contractor shall provide to the Administrative 3080 Contracting Officer a fully redacted version of the contract, including all documents that are incorporated 3081 by reference on the Standard Form 26. The Contractor shall provide a camera-ready redacted copy and a 3082 matching copy that highlights the portions that have been redacted. Both copies must be in electronic format, and will be provided on the same CD-ROM. The Contractor must work diligently with the ACO 3083 3084 until the Government and Contractor can agree upon all redacted material. 3085 3086 The Contractor shall provide the required deliverables based on the schedule identified in individual task 3087 orders issued by the Government. Specific means and format of deliverables will be specified in 3088 individual task orders. 3089

F.5 CONTRACT DELIVERABLE ACCEPTANCE

Any contract documentation deliverable produced under this contract will be accepted or rejected in writing by the Government. Unless otherwise specified in the task order, the Government will have up to ten (10) working days to review the deliverable and provide comments. During this review period, the Government will have the right to reject or require correction of any deficiencies found in the deliverable that are contrary to the information contained in the Contractor's accepted proposal. After receiving the comments, the Contractor shall incorporate the changes into the deliverable and resubmit the final deliverable to the Government for approval. After final submission, the Government will have ten (10) working days to approve the final submission.

If the Government fails to complete the review within ten (10) working days after receiving the deliverable, the deliverable will become acceptable on an interim basis. If deficiencies are discovered after this period, the Government will provide in writing a description of all discrepancies to be corrected by the Contractor. After receiving the description of the discrepancies, the Contractor shall incorporate the changes into the deliverable and resubmit the deliverable to the Government. If the Government fails to respond within ten (10) working days of the final submission, the submission will be considered accepted.

3108 **SECTION G** 3109 CONTRACT ADMINISTRATION DATA 3110 3111 3112 3113 **G.1 CONTRACT ADMINISTRATION** 3114 Notwithstanding the Contractor's responsibility for total management during the performance of the 3115 contract, the administration of the contract will require maximum coordination between the Government 3116 and the Contractor. The following sections describe the roles and responsibilities of individuals who will 3117 be the Government and Contractor points of contact. 3118 3119 **G.1.1** Procuring Contracting Officer 3120 During the solicitation phase of this procurement, which is up to and including contract award, the 3121 Procuring Contracting Officer (PCO) is the Government's sole point of contact. The person designated as 3122 PCO for this procurement is Mr. Robert H. Corey. All documents and issues concerning the procurement 3123 should be provided to Mr. Corey at the following address: 3124 3125 General Services Administration 3126 Office of Chief Acquisition Officer 3127 Operational Contracting Staff (VC) 3128 1800 F Street NW (Room G127) 3129 Washington DC, 20405 3130 Attention: Mr. Robert H. Corey 3131 3132 Mr. Corey's telephone number is (202) 501-1797; his facsimile number is (202) 501-4281; and his e-mail 3133 address is: bob.corey@gsa.gov. 3134 3135 **G.1.2** Administrative Contracting Officer 3136 After contract award, Mr. Corey will appoint the General Services Administration Administrative 3137 Contracting Officer (ACO) by written notice to the Contractor. Upon appointment, the ACO will become 3138 the Government's sole point of contact. The ACO is responsible for administration of the contract. The 3139 right to issue contract modifications to the terms and conditions of the basic contract that is within the 3140 scope of that contract, to terminate the contract, to exercise option renewals, and to approve 3141 subcontractors will be delegated in writing to the ACO. 3142 3143 Communications pertaining to contract administration matters shall be addressed to the ACO. The ACO 3144 will be the only person authorized to make or approve changes in any of the requirements of this contract, 3145 and, notwithstanding any provision and/or clause contained elsewhere in the contract, said authority will 3146 remain solely with the ACO. In the event that the Contractor makes any change in the contract price, the 3147 Performance Work Statement, or any other contract terms and conditions at the direction of any person 3148 other than the ACO, such change shall be considered to have been made without authority, and no 3149 adjustment shall be made in the contract price to cover any increase in costs incurred as a result thereof. 3150 3151 When necessary, the ACO will: 3152 3153 o Serve as liaison between the Contractor and Using Agencies

3154 o Assist in expediting orders

- o Ensure compliance with contract requirements
- o Issue final decisions and handle all disputes under the Contract Dispute Act
 - o Delegate contracting authority to a Federal Department, Agency, or Other Authorized Entity ("Using Activity") Contracting Officer for the purposes of requesting quotes and awarding task orders and subsequent task order modifications under this contract.

G.1.3 Task Order Contracting Officer (TO/CO)

Subsequent to contract award, task order requests will be issued primarily by the ACO. GSA may, however, delegate contracting authority to a Using Activity's contracting officer to request quotations directly from USA Contact Contractors, and to award task orders and modifications to task orders under the appropriate indefinite-delivery, indefinite-quantity contract. The Contracting Officer who is responsible for issuing a Request for Quotation (either the ACO or a Using Activity Contracting Officer) becomes the cognizant Contracting Officer for that requirement, and, therefore assumes the title of Task Order Contracting Officer (TO/CO). The TO/CO is the Government's single point of contact for each task order issued by that TC/CO. The TO/CO is responsible for administration of the task order, issuance of task order modifications, authorizing changes in terms and conditions of the task order, terminating the task order, exercising option renewals, and approval of subcontractors.

The Activity Contracting Officer will be appointed as a TO/CO in writing by the ACO. A copy of each appointment letter will be provided to all USA Contact Contractors. Contractors are cautioned that, unless they are in receipt of an appointment letter signed by the ACO, they should take no action in response to a Request for Quotation which has been identified as a requirement under the USA Contact program. Instead, the Contractor shall immediately notify the ACO, and provide him/her with the details of the request.

Communications pertaining to task order administration matters shall be addressed to the TO/CO. The TO/CO will be the only person authorized to make or approve any changes in any of the requirements of the task order for which he/she is responsible. In the event that the Contractor makes any changes at the direction of any person other than the TO/CO, such change shall be considered to have been made without authority, and no adjustment shall be made in the task order price to cover any increase in costs incurred as a result thereof. When necessary, the TO/CO will:

- o Serve as liaison between the Contractor and Using Agencies
- Assist in expediting orders
 - o Ensure compliance with task requirements
- o Issue final decisions and handle all task order disputes under the Contract Dispute Act

3192 G.1.4 Contracting Officer's Technical Representative

The TO/CO will appoint a Contracting Officer's Technical Representative (COTR) to ensure orderly performance of this contract and subsequent task orders. Appointment of the COTR will be made in writing upon contract/task order award. A copy of the appointment letter will provided to the task order Contractor.

The COTR is authorized to be the technical point of contact under this contract; however, the Contractor shall direct all inquiries of either a technical or a non-technical nature through the TO/CO.

The types of actions within the purview of the COTR's authority include:

- 3202 o Ensuring that the Contractor performs the technical requirements of the contract;
 - Conducting or causing to be conducted inspections necessary in connection with performance of the contract;
 - o Monitoring the Contractor's performance under the contract, and notifying the Contractor and TO/CO of any deficiencies observed;
 - o Coordinating Government-furnished property availability (if required); and
 - o Providing for site entry of Contractor personnel if required.

The COTR may provide technical direction and general performance-related guidance to the Contractor. As used herein, "technical direction" means direction to the Contractor that fills in details, suggests possible lines of inquiry, or otherwise completes the general scope of the work. "Technical direction" must be within the terms of this contract; shall not change or modify the contract/task order in any way; and shall not constitute changes, as described in contract clause 53.243-1, Changes -Fixed Price or 52.243-3 Changes - Time and Materials or Labor Hour, which may only be accomplished by the TO/CO.

The COTR will provide no supervisory or instructional assistance to Contractor personnel. The COTR's responsibility is to provide Contractor access to working data, and to clarify technical requirements as necessary to ensure useful expenditure of Contractor effort. The COTR is not empowered to make any commitments or changes which affect the contract/task order price, other terms and conditions, or delivery provisions. Any such proposed changes must be brought to the immediate attention of the TO/CO for action. The acceptance of any changes by the Contractor without the specific approval and written consent of the TO/CO shall be at the Contractor's risk.

If in the Contractor's opinion, the COTR requests or indicates an expectation of effort which would justify or require an equitable adjustment to the contract/task order, the Contractor shall promptly notify the TO/CO in writing; however the Contractor shall take no other action on that request or effort until the TO/CO has issued a change or otherwise resolved the issue.

G.1.5 Contractor's Points of Contact

The Contractor shall provide an organizational structure for the management and administration of task orders under this program. The organizational structure shall include personnel to perform the following functions:

- o Serve as the point of contact to interface with the Government (GSA and Using Agencies) on issues related to program administration
- o Oversee the overall management and operations of services provided under each task order

- O Serve as the point of contact to interface with the Government (GSA and Using Agencies) on major issues related to operational support and implementation
 - o Coordinate as necessary with the COTR, Using Agencies, and subcontractors in providing services under a task order
 - o Serve as the single point of contact to interface with the CO/COTR and meet with the Government (GSA and Using Agencies) on planning and operational issues related to classified requirements and/or problems, in the event of national security threats and/or disaster situations.
 - O All key personnel assigned by the Contractor to fulfill contract management and administrative functions shall be accessible to the Government (GSA and Using Agencies) 24 hours a day, 7 days a week by telephone, cellular telephone, Blackberry-type device, or pager. Lists of all Contractor points of contact shall be provided, including telephone, cellular telephone, and pager numbers and e-mail addresses. The Contractor shall provide the TO/CO with an updated list of all points of contact within five (5) calendar days after changes to the list.

G.2 SERVICE ORDERING

This contract will be used by the Government to provide complete managed multi-channel inquiry response and management solutions to support the USA Services project, including support for other E-Gov initiatives, and other Using Agency programs. Section C, the Performance Work Statement, establishes the overall scope of work that may be performed under this contract.

The Government will order services under this contract by means of task orders with specifically defined work requirements, deliverable products, performance standards, and schedules. The Contractor shall perform work under this contract only as directed in task orders issued by the TO/CO.

The Contractor shall provide the services and, if required, incidental supplies specified on each task order at the price set forth on each task order. Orders may be issued under this contract from date of each IDIQ contract award through the life of the contract. All task orders issued under this contract are subject to the terms and conditions of the contract. If there is a conflict between the terms and conditions of the contract and those of the task order, the terms and conditions of the contract shall prevail. All task orders issued prior to the end of the contract shall be honored and performed by the Contractor according to all terms and conditions of the contract, subject to the Government's rights and remedies thereunder. Copies of all task orders shall be maintained by the Contractor for the duration of the contract through final closeout.

G.2.1 Fair Consideration Process

When a requirement is identified by a Government agency, the TO/CO will issue a Request for Quotation. Requirements will be grouped together to the extent that it is practical to do so. All contract holders will be provided a fair opportunity to propose on all requirements in excess of \$2,500.

Contract holders need not be given an opportunity to be considered for a particular order in excess of \$2,500 when the TO/CO determines that:

The need for services is of such urgency that providing a fair opportunity to all Contractors would result in unacceptable delays

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- o Only one such contract holder is capable of providing the services at the level of quality required because the services ordered are unique or highly specialized
- The order should be issued on a sole-source basis in the interest of economy and efficiency as a logical follow-on to a task already issued under the contract
- It is necessary to place an order to satisfy a minimum guarantee

Examples of exceptions include, but are not limited to, those described in the following table. These examples are provided only for purposes of illustration.

Table G.1. Exceptions to Fair Opportunity

Exception Provided for by 41 USC §253j [abbreviated description]	Examples of Task Order Types that Qualify As Exceptions
Unusual urgency that would lead to unacceptable delays	 Natural disaster or other emergency needs Military/mobilization needs Immediate short-term need arising on short notice
Only one capable Contractor	Only one Contractor offers the service Only one Contractor offers the service to the locations where the service is needed Only one Contractor can demonstrate that it is capable of providing service in the manner required by the user or to the required locations
Economy, efficiency and logical follow-on to an order already issued under fair consideration	O Task orders associated with any moves, additions, changes, or similar needs O Incremental task orders for the same or a new service to locations where service already exists or has been ordered O Task orders placed to minimize inefficiencies or additional costs that would result from introducing multiple maintenance, operations, training network management, or other support systems O Task orders placed to maintain the engineering and operational integrity of, or to augment an established telecommunications capability within an organization
Meet a minimum revenue guarantee	No examples provided.

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Address:

Phone:

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The TO/CO's source selection decision on each task order is final, and is not subject to the protest or disputes provisions of the contract, except for a protest asserting that the task order increases the scope, period, or maximum value of the contract. Disputes related to other matters affecting the task order award may be directed to the Ombudsman designated for this contract. The Ombudsman will be responsible for those duties described in FAR §16.505(b)(5). The Ombudsman for GSA is:

George N. Barclay Name: GSA Service Order Ombudsman

1800 F Street, NW

Washington, D.C. 20405

(202) 501-2200

The Government reserves the right to modify this fair consideration process, and will notify the Contractors of any such modifications in advance of any task orders being placed using such a modified process.

G.2.2 Task Order Request for Quotation

The normal method for issuing Requests for Quotation will be by electronic mail; however, the TO/CO may choose to use postal mail or facsimile. Proposed contracting actions will not be synopsized in FedBizOpps per the exception at Federal Acquisition Regulation §5.202(a)(6).

Contract holders will submit a task quotation to the TO/CO not later than ten (10) working days after the issue date of the task request, unless a specific date is identified in the task request. All costs associated with the development and presentation of the contract holder's quotation shall be borne by the contract holder.

If a contract holder needs a pre-quotation meeting, a request for such meetings shall be made to the TO/CO not later than three (3) working days after receipt of the task request. All contract holders will be invited to any such meeting unless the Request for Quotation is being issued under one of the exceptions to the fair consideration process identified in paragraph G.2.1. If a pre-quotation meeting is held, the quotation shall be submitted within ten (10) working days after the pre-quotation meeting.

At a minimum, Requests for Quotation will contain the following information:

- o Performance Work Statement
- o performance standards
- o instructions on quotation preparation
- o period of performance
- o date, time and place for receipt of quotations
 - o method of evaluation (lowest price technically acceptable or best value)
- o evaluation factors to be used.

The offeror's quotation shall comply with the specific requirements of the Request for Quotation. As a general rule, these requirements will include the following sections:

A narrative description of the plans for performance and technical approach, including a
description of the work and how it will be accomplished; qualitative descriptions of any
automated tools and any structured methodology proposed; and any potential risks or problem
areas.

o Identification of assumptions on the Contractor's part used in developing the technical or cost portions of the quotation.

o Definitions and schedules for milestones and deliverables products; description of acceptance criteria, including when and how the Contractor shall ensure each is met.

O A general work breakdown structure for accomplishing the task requirements and functions identified above, showing the skill level, number of people (full and part time, and indicating the number of hours for part time personnel), and the total hours that shall be applied to each period of time.

- o Detailed discussion of any other overtime or other-than-normal work schedule hours that the Contractor may propose, or a Work Breakdown Structure for Fixed Price Task Orders.
 - A detailed work breakdown structure for accomplishing the task requirements identified above, showing the skill level, number of people, and labor hours shall be applied to each milestone and deliverable product. The proposed staffing and work hours must be consistent with the Contractor's staffing plan, including a detailed rationale of how the skill level and number of people were determined, and how they will be utilized
 - o An affirmation that the fully burdened rates contained in Section B of this contract are ceiling price rates. However, the Contractor may, at its discretion, elect to propose lower rates on a task-by-task basis.

Each ODC (Other Direct Costs) entry must be accompanied by a breakdown by element of its composition, and an estimate for each element, together with a total estimated ODC cost. The Contractor will also provide an explanation of why the ODC is required. All travel requirements in the Request for Quotation's PWS must be included. Any additional travel the Contractor considers necessary for performance under the task order must be described, justified, and included in the cost estimate. If required by the task request, the Contractor will use the rates in the then-current Federal Travel Regulation for estimating the cost of travel and per diem.

Quotations shall be submitted in accordance with the instructions provided in each Request for Quotation. All staffing, staffing hours and costs, ODCs by principal category, and totals shall be shown.

The Contractor shall submit a quotation that conforms to the requirements of a Request for Quotation's PWS. In addition to that quotation, the Contractor may submit a separate alternative quotation, if the Contractor feels that another technical approach or pricing structure more economically or efficiently accommodates the Government's requirements. The alternative quotation must be identified as such and include a clear explanation of the differences in approach the perceived benefits to the Government.

Once quotations have been received, the TO/CO need not contact each of the contract holders under the contract before selecting an awardee, if the TO/CO has ensured that each contract holder was provided a fair opportunity to be considered for the order. Award will be made to the successful Contractor based on the evaluation criteria established in the task request.

G.2.3 Discussions and Final Quotation

When required, discussions will take place at a place and time designated by the TO/CO. After each round of discussions, each offeror will be given the opportunity to revise its quotation, making whatever changes it feels necessary to enhance the possibility of an award. When the TO/CO feels there is a clear meeting of the minds with all offerors, he/she will conclude discussions and call for a Final Quotation Revision. The final revised quotation shall reflect all agreements reached during discussions.

G.2.4 Award of a Task Order

- A task order specifies work to be accomplished by the Contractor to satisfy a Government requirement, and establishes a time-frame and price, or not-to-exceed price (so identified), for accomplishing the work. The task order defines the performance of a specified unit of work in a definable service or applications area, and may have one or more deliverable products.
- The TO/CO will award task orders using a GSA Form 300 (or other appropriate Using Agency form "Award Document") that incorporates the Performance Work Statement and the contract holder's final

- revised quotation by reference. The Award Document authorizes the Contractor to proceed based upon the agreed-to technical requirements, milestone and deliverable schedules, and total award price. For fixed price tasks, a milestone schedule including start and end dates for each milestone or deliverable shall be submitted with the quotation.
- All tasks must be fully staffed within ninety (90) calendar days after task award (the date in block 1 of the GSA Form 300, or Agency equivalent) unless otherwise specified in the task order.
- 3427 Resumes for key personnel as defined in the Request for Quotation shall be submitted to the Government 3428 in the format specified in the task order. The Government will approve or reject the resume in writing 3429 within five (5) workdays of its receipt. For approved resumes, the Contractor shall notify the Government 3430 when the individual will report for work on the task order. If review of the resume determines the 3431 individual not to be qualified for the position indicated, the resume shall be rejected and a written 3432 explanation provided. If the Contractor desires further consideration of the candidate, the resume must be 3433 resubmitted within two workdays of the notice of rejection with the necessary clarification or additional 3434 information. Rejection of a resume does not obviate the Contractor's responsibility to fully staff the 3435 facility with ninety (90) calendar days after task award, or as otherwise specified in the task order.

3437 G.2.5 Task Order Changes

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Task orders may be modified, either at the Government's initiative, or in response to a request from the Contractor. No direction changing the requirements of a task order will be binding upon the Contractor unless issued by the TO/CO in writing. Likewise, the Government shall not be liable for an equitable adjustment to the price of a task order on account of a change, unless the change is authorized in writing by the TO/CO. Task order modifications are issued by means of a Standard Form 30 (Amendment of Solicitation/Modification of Contract).

3445 G.2.6 Failure to Reach Agreement

3446 If agreement cannot be reached on total task order price, time for performance, or other terms of the agreement, the TO/CO may unilaterally establish the terms at issuance. The Contractor may pursue any disagreement as a dispute under the "Disputes" clause of this contract.

3450 G.2.7 Types of Tasks

- 3451 G.2.7.1 Fixed-Price Task
- A task order with well-defined requirements and fixed deliverable products will normally be issued on a fixed price basis.
- 3455 G.2.7.2 Time and Material or Labor Hour Task
- A task order for which the performance requirements or deliverable products cannot be quantified or well-defined in advance typically will be issued on a time and material or a labor hour basis. Work orders are issued by the Government to define individual performance requirements for specific work or milestones to be accomplished.

G.3 CONTRACT ACCESS FEE

3463 GSA operating costs associated with awarding and managing this contract may be recovered through a 3464 Contract Access Fee (CAF) of the total invoice amount.

3466 GSA will determine the amount of the CAF after contract award. GSA has the unilateral right to change 3467 the percentage at any time, but not more than once per year. As part of each invoice, the Contractor shall 3468 collect the CAF and then rebate it to GSA. The timing of the rebate, the organization to which it will be 3469 delivered, and the method of delivery will all be specified in the individual task orders.

Where multiple invoices and/or multiple orders are involved, the CAF may be consolidated into one payment. To ensure that the payment is credited properly, the Contractor shall submit a check along with a printed copy of the "Cost Recovery Report (CRR)" as required by section G.5.4. Each check shall be annotated with the corresponding contract number.

The Contractor shall pay GSA not later than 30 calendar days after the end of the reporting quarters specified in section G.5.

If the full amount of the CAF is not paid within 30 calendar days after the end of the applicable reporting period, it shall constitute a debt to the United States Government under the terms of FAR 32.6. The Government may exercise all rights under the Debt Collection Act of 1982, including withholding or setting off payments and interest on the debt (see FAR 52.232-17, Interest).

The Contractor shall submit to GSA sales reports and payment information in a timely manner.

Failure on the part of the Contractor to pay GSA all CAF which is currently due in a timely manner, or the willful submission of inaccurate information in sales reports or payment information, constitutes a material breach of the contract's terms and conditions.

G.4 BILLING AND PAYMENT

G.4.1 General Billing Information

The Contractor shall deliver invoices and billing support data to GSA, and, if so specified in task orders, to the Using Agency via paper or electronic format in a mutually agreed upon medium. Agreement will be reached at time of award. If agreement cannot be reached, the TO/CO will establish the medium to be used. Each invoice shall reflect all charges from the first day through the last day of the previous billing cycle. The Contractor shall charge for all services or equipment within three billing cycles after the services were rendered.

The Contractor shall submit a properly prepared invoice for services or supplies that have been accepted by the Government not later than five (5) work days after such acceptance has taken place. In the absence of Government acceptance within 30 days, the Contractor shall submit the invoice.

A separate invoice shall be submitted for each task order. Invoices shall be prepared on official company letterhead, and provide price information for each contract line item number (CLIN) being billed. In addition, each invoice shall include the following minimum task order identification data:

- o GSA contract number
- o GSA or Using Agency task order number
- o Purchase Request Number: the number used by GSA or the Using Agency to control the commitment of funds
- o Period of Performance: monthly services performed or deliverable completed
- 3513 o Invoice Number

OClient name and address

When the paying office is GSA, the original of each invoice with supporting documentation shall be submitted to the GSA Paying Office designated in Block 24 of the Award Document. In those cases where the paying office is other than GSA, the invoice/paying office will be designated on an order-by-order basis. Up to two additional copies of each invoice with supporting documentation shall be submitted to the address(es) as designated on an order-by-order basis.

For fixed price tasks, an invoice reflecting amounts that do not exceed the fixed price approved for that deliverable product or service in the task order shall be submitted for those tangible deliverable products or services that have been accepted by the Government.

For time and materials tasks, the amount invoiced shall include labor charges for actual hours worked and other allowable and allocable expenses based upon contract rates and conditions, not to exceed the limits specified in the task order, provided that such charges have been accepted by the Government. Contractors should note that profit is to be applied to labor charges only.

For other direct costs (ODC) such as equipment, software, supplies and services not previously priced under this contract, non-routine travel or per diem, etc., invoices shall reflect the Contractor's actual expense for the item, plus General and Administrative costs (G&A) (the only allowable indirect cost). These charges shall not exceed the limits specified in the task order. No charges will be paid by the Government for goods, services, or rates which are not specifically detailed in the individual task order. The invoices shall also include the CAF as ODC. CAF is a percentage of the total amount of goods or services being invoiced. The percentage to be used will be stipulated by GSA prior to issuance of the Requests for Quotation.

Copies of Contractor paid invoices, receipts, and travel vouchers completed in accordance with Federal Travel Regulations (FTR) shall be maintained by the Contractor, for the duration of the task order and for three (3) years thereafter, and made available to the Government upon request.

Invoices for final payment must be so identified, and submitted when tasks have been completed and no further charges are to be incurred. These close-out invoices, or a written notification that final invoicing has been completed, must be submitted to the ordering agency within 60 days of task order completion. A copy of the Government's written acceptance of task completion must be attached to final invoices. If the Contractor requires an extension of the 60-day period, a request with supporting rationale must be received by the TO/CO prior to the end of the 60-day period.

The Contractor shall not be compensated directly for payment of the salaries or wages of the Program Manager, Group Managers, or any other management or staff member not directly associated with and negotiated for task order performance as direct-charge hourly-rate contract line items.

G.4.2 Billing Content

At least fifteen (15) days prior to its initial submittal, the Contractor shall provide an example and specify the content and format of all invoice(s) to be used for the billing of services required under this contract. Each invoice shall contain all pricing components in sufficient detail necessary to reconcile charges with actual usage.

G.4.3 Payment of Invoices

Payment of invoices will be made based upon acceptance by the Government of the entire task, of the completion of payable milestones (identified as such) in the task order, of the tangible product

deliverable(s) invoiced, or for services rendered during the time period invoiced and accepted on a periodic basis.

If the services provided fail to conform to the technical requirements of the task order or do not conform to the terms and conditions of the contract, the TO/CO will take action in accordance with FAR clause 52.246-04 entitled, "Inspection of Services-Fixed Price", or 52.246-06 entitled, "Inspection of Services Time and Materials and Labor Hour", whichever is applicable.

Payment to the Contractor will not be made for temporary work stoppage due to circumstances beyond the control of the Government, such as acts of God, inclement weather or power outages and the results thereof, or temporary closings of facilities at which Contractor personnel are performing. This may, however, be justification consideration under the clause entitled, "Excusable Delays".

Section B of this contract contains Contract Line Item Numbers (CLINs) for overtime. However, overtime CLINs will only be billable when approved in advance and in writing by the TO/CO to meet task order requirements on a bonafide exigency basis. The Government will not authorize overtime to compensate for shortcomings in Contractor performance.

The Contractor will be reimbursed by the Government for non-routine travel and per diem expenses incurred by Contractor personnel for travel specifically authorized in a task order and approved by the Government. The Government may require the Contractor to use Government supply sources for official travel, subject to the same conditions as those applicable to Government employees; except that the Contractor's employees are not "employees of the Government" as defined by 28 U.S.C. 2671, and thus are not covered under the tort claims provisions of 28 U.S.C. 2679(b). Note: if a time and materials task order is issued under this contract, only actual costs for material are reimbursable, per FAR 16.601.

G.4.4 Billing Disputes

The Government requires evidence that the services ordered have been provided, and that each associated charge has been priced correctly, or it may dispute the charge.

The Contractor shall attempt to resolve billing disputes to the satisfaction of the Government within sixty (60) calendar days following official notification from the TO/CO or COTR that such a dispute exists. The Contractor shall take a proactive lead in resolving disputes promptly with the initiator of the dispute by establishing and maintaining meaningful dialogue directed toward a fair and equitable resolution. In cases where a resolution is not forthcoming, the Contractor shall submit partial resolutions valued at (less than the total amount in dispute) to the Government for acceptance or denial. The TO/CO or his/her representative, so designated in writing by the TO/CO, will respond within five business days with a proposed resolution. If either party wants to escalate the dispute to the TO/CO at any time, it may do so. Disputes that are not resolved within 60 calendar days, or within the approved extension time, must be escalated to the TO/CO. Any disputes escalated to the TO/CO will be resolved in accordance with Federal Acquisition Regulation (FAR) 52.233-1 (Alternate I) (Disputes).

G.4.5 Right to Withhold Payment

The Government reserves the right to withhold a partial or entire payment of an invoice as provided for in FAR clause 52.232-01 entitled, "Payments".

3613 G.5 REPORTING REQUIREMENTS

Contractors are required to provide the requisite reports identified in this section as part of contract administration. Contractors will not be compensated directly by the Government for the preparation and delivery of the requisite reports for the duration of the contract, including the contract base period and all option periods and extended performance periods if applicable.

3619 G.5.1 Sales Reports

- The Contractor shall electronically report all sales under this contract. "Sales" means the dollar amount invoiced under the task order. The Contractor shall accurately report the dollar value, in U. S. dollars and rounded to the nearest whole dollar, by calendar quarter (January 1–March 31, April 1–June 30, July 1–September 30, and October 1–December 31). Reports, including "zero" sales shall be submitted electronically to an e-mail address provided by the ACO after contract award.
- The report is due within thirty (30) calendar days following the end of the reporting quarter. The Contractor shall continue to provide the report until final closeout of all task orders. Reporting will be by contract at the task order level. Reports for multiple contracts shall not be consolidated.
- Failure to submit required reports or the falsification of reports is sufficient cause for the Government to terminate the contract for default under the termination provisions hereof.

3633 G.5.2 Task Status Reports

As directed by GSA or client representatives, these reports shall be defined in the Performance Work Statement or work orders, and shall be prepared by task personnel and funded by the client.

G.5.3 Reports on Special Hiring

The Special Hiring Report is a report that shows whether the Contractor is meeting the 5% minimum special hiring objective required in Section H.8. The report shall be electronically submitted via e-mail to an e-mail address specified by the ACO, using the GSA specified format (currently Microsoft Office Excel 2003), by the tenth work day following the close of the calendar month. The report shall include the Contract Number, Task Order Number, Ordering Agency, Client, Special Hire Organization, Quantity of Total Contact Center Staff, Quantity of Special Hire Staff, and the percentage of Special Hire Staff of Total for each reporting period. The report shall include monthly totals and cumulative totals for all tasks performed under this contract. The report is required even when no tasks were performed during the reporting period, and shall continue to be provided until all task orders are completed under the contract.

G.5.4 Cost Recovery Report (CRR)

The CRR is a report of all invoices tendered under this contract, including the collection of all Contract Access Fees. The CRR shall be electronically submitted via e-mail to an e-mail address specified by the ACO, using the GSA specified format (currently Microsoft Office Excel 2003), by the tenth work day following the close of the calendar month. The CRR shall include the Contract Number, Task Order Number, Ordering Agency, Client, the Invoice Number, Date of Invoice, the Invoice Amount, and the amount of the Contract Access Fee for each invoice of the reporting period. The report shall include the total amount of the listed invoices and Contract Access Fees for both the reporting period, as well as cumulative totals for the contract to date. A CRR is required even when no invoices are submitted during the reporting period, and shall continue to be provided until all task orders are completed under the contract.

100 of 174 pages

The Government reserves the right to inspect without further notice such records of the Contractor as pertain to orders under this contract. Willful failure or refusal to furnish the required reports, or falsification thereof, shall constitute sufficient cause for terminating the contract for default under FAR 52.249-8, Default (Fixed-Priced Supply and Service).

G.5.5 Utilization of Small Business Reporting

If required according to its business size, the Contractor shall submit the following Standard Forms (SF) and Optional Form (OP) for compliance with FAR, Part 19.7. The Contractor shall provide subcontracting information during the entire time that it is providing task order service under this contract.

The purpose of the forms is to collect subcontracting information on awards to: small business, small-disadvantaged business, women-owned small business, veteran-owned small business, veteran-owned small business, service-disabled veteran-owned small business and HUBZone small business concerns under the Contractor's subcontracting plan.

Each report shall be submitted to the GSA Contracting Officer, with a copy to the TO/CO, if reporting a task order written by an Agency contracting officer. Reports are due 30 days after the close of a reporting period.

Subcontracting Report for Individual Contracts (SF 294): This report is required on every task order and must be submitted semi-annually (for the six months ending March 31st and the twelve months ending September 30th). A separate report must be submitted for each task order.

Summary Subcontracting Report (SF 295): The report shall be submitted semi-annually (for the six months ending March 31st and the twelve months ending September 30th, if the task order is a Department of Defense requirement, and annually (for the twelve months ending September 30th for all other Agencies).

Small Disadvantaged Business Participation Report (OP 312): This report is prepared and submitted only when the Contractor is submitting a report for the last performance period of a task order on a Standard Form 294.

G.6 MARKETING

3695 G.6.1 Marketing Calls

The Contractor shall coordinate marketing efforts with the Director of USA Service at GSA to keep him/her apprised of planned client visits. The current director if GSA's USA Services E-Gov Initiative is Mr. Stuart Willoughby. His contact information is as follows:

3700 General Services Administration
3701 Office of E-Gov Solutions Support (XCE)
3702 1800 F Street, NW (Room G-132)
3703 Washington D.C. 20405-0001

Telephone Number: (202) 501-9121

G.6.2 Trade Shows/ Exhibitions

3711 <u>SECTION H</u>

TERM OF CONTRACT

3712 SPECIAL CONTRACT REQUIREMENTS 3713

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The term of this contract shall cover a Base Period of two (2) years, followed by four (4) two-year option periods. The Government reserves the right to extend the term of this contract at the prices set forth in Section B in accordance with the terms and conditions contained in the clause in Section I, "Option to Extend the Term of the Contract".

During the contract base period and any of the option periods exercised by the ACO, the Government may issue task orders with performance periods, including options, of up to five (5) years in duration, provided that the task orders do not extend beyond year 3 of the Extended Performance Period. The term of such task orders can extend beyond the term of the contract under which it is written. If the situation arises where the task order will extend beyond the maximum term of the contract (i.e., into years eleven [11] through thirteen [13] after contract award) the prices set forth for Extended Performance Periods in Section B shall apply for the respective periods.

H.1.1 Transition and Start-Up

The time period required to transition new requirements will be determined on a case-by-case basis, and shall be stated in individual task orders. Transition shall begin at Notice-To-Proceed and continue for a period as specified in the task order. During the transition period, the Contractor shall work with the Government to develop a sound project implementation plan and to perform all preparatory work to establish one or more fully functional multi-channel contact centers in support of the task. The Government will transfer business and procedural data, including appropriate training material, to the Contractor, and work with the Contractor to establish appropriate system feeds. The transition period will provide the Contractor with the opportunity to prepare and staff its contact center; develop the support the knowledge base and scripts for automated response in support of the project; establish a fully functional contact center to handle the expected work volume; and complete all transition related activities to migrate the service to the new center. Government personnel will closely monitor the Contractor's effort to ensure a successful launch. Based on the Contractor's ability and expert advice on transitioning the work volume, the Government reserves the right to coordinate with the Contractor to achieve a staffing plan that minimizes disruption of the existing services and seamlessly transitions the customer base and work volumes to the new center.

H.1.2 North American Industry Classifications System (NAICS) 519190

Effective October 1, 2000, Small Business size standards for all Federal Government Programs are those that the U.S. Small Business Administration (SBA), in conjunction with the U.S. Census Bureau, has established for industries as described in the NAICS. Size standard for industries described in Standard Industrial Classification (SIC) have been replaced by the NAICS and no longer apply.

For the purpose of this contract, NAICS Code 519190, Other Information Services, applies. The size standard is \$6,500,000.

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H.2 OVERALL CONTRACT MINIMUM AMOUNT

3758 The Government guarantees that this Contractor will be awarded a minimum order amount of \$10,000.00 3759 (ten thousand dollars) in aggregate task orders.

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Task orders involving any item listed under Section B of this contract, including any Other Direct Costs associated with that item, will apply toward the calculation of the minimum order amount.

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H.3 OVERALL CONTRACT MAXIMUM AMOUNT

The maximum aggregate value of all task orders awarded under "USA Contact" shall not exceed \$2,500,000,000.00. USA Contact is defined as all contracts resulting from GSA solicitation GSV07PD0003.

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Task orders involving any items listed under Section B of this contract, including any Other Direct Costs associated with those items, will apply toward the calculation of the minimum order amount. The maximum contract limitation shall be applied to the aggregate value of the base period and all option periods of all USA Contact contracts.

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SUPERVISION OF CONTRACTOR PERSONNEL **H.4**

The Contractor's employees shall remain under the Contractor's direct supervision at all times. Although the Government will coordinate direction within the scope of the contract, detailed instructions for the Contractor's employees' performance and supervision shall remain the sole responsibility of the Contractor.

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H.5 STANDARDS OF CONDUCT AND RESTRICTIONS

The Contractor shall adhere to the same professional and ethical standards of conduct required of Government personnel. The Contractor shall not:

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o Discuss with unauthorized persons any information obtained in the performance of work under this contract:

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o Conduct business other than that which is covered by this contract during periods paid by the Government;

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o Conduct business not directly related to this contract on Government premises;

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Use computer systems and/or other Government facilities for company or personal business; or

3797 3798 o Recruit personnel on Government premises or otherwise act to disrupt official Government business.

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H.6 REMOVAL OF CONTRACTOR PERSONNEL

Transfer and/or assignment of Contractor personnel shall be the prerogative of the Contractor; however, when the Task Order Contracting Officer (TO/CO) so directs, the Contractor shall remove from performance on the contract any and all persons who identified by the TO/CO as endangering life, property, or national security. The TO/CO's decision is final and is not subject to discussion or negotiation.

H.7 KEY PERSONNEL

The Program Manager, Project Manager, or a designee who is capable of binding the Contractor contractually shall be considered key personnel for this contract. The Program Manager shall be the overall manager of the contract and single point-of-contact for resolution of contract-related issues.

The Contractor shall provide the following key personnel with assignment responsibilities as indicated:

H.7.1 *Program Manager* – responsible for managing and implementing the overall contract requirement and overseeing implementation of more complex tasks; organizes, directs, and coordinates planning, and implements all contract and/or task order support activities; interacts with high level program officials regarding issues and status of the contract and/or task orders; coordinates financial and staffing resources; monitors and analyzes contract and performance data, and reports results to senior Government officials; coordinates recruitment and training activities to keep staff current on agency programs and performance objectives; manages the activities of subcontractors; and reviews contract, operations and management reports. The Government reserves the right to approve the selection of the Contractor-assigned Program Manager prior to his/her placement in supporting a task order issued under this contract.

H.7.2 *Project Manager* – responsible for managing and implementing the overall Project; organizes, directs, and coordinates planning, and implements all Project support activities; interacts with Government program officials regarding issues and status of Projects; coordinates financial and staffing resources; monitors and analyzes performance data and reports results to the Government; coordinates training activities to keep staff current on Government programs and customer service objectives; and manages the activities of subcontractors. The Government reserves the right to approve the selection of the Contractor-assigned Project Manager prior to his/her placement in support of the task.

H.7.3 Site Manager – responsible for overall daily operations and management of the contact center, including staffing, facility, training, service delivery, problem escalation and resolution, and performance monitoring; provides technical assistance for the planning, design, installation, modification, and operation of telecommunications and information systems capabilities; ensures all functions and processes are implemented and operated properly.

H.7.4 Information Systems Security Manager (ISSM) – responsible for ensuring that information systems used in supporting task requirements comply with initial and ongoing information systems security requirements, in accordance with FIPS Publication 200, Minimum Security Requirements of Federal Information Systems. The ISSM shall ensure that information systems used to support a specific task meet the minimum security requirements as defined in FIPS Publication 200 through the use of security controls, in accordance with the NIST Special Publication 800 – 53, Recommended Security Controls for Federal Information Systems, As Amended. This includes preparing all required documentation for the compliance process, including a security plan, risk assessments, contingency and contingency test plans, a configuration management plan, system test and evaluation reports, security certifications, and an accreditation package.

The Contractor shall use all commercially reasonable efforts to ensure the continued availability of key personnel assigned to each task. Key personnel proposed and accepted for task orders issued under this

3852 contract are expected to be and remain dedicated to the task. Unless indicated otherwise in the Request 3853 for Quotation, key personnel will be dedicated to the task on a full-time basis. Substitutions will not be accepted unless specifically agreed upon in writing by the TO/CO. During the first one hundred eighty 3854 3855 (180) days of the task order performance period, no key personnel substitutions will be permitted unless 3856 such substitutions are necessitated by an individual's sudden illness, death, or termination of employment, 3857 or as otherwise approved by the TO/CO. In any of these events, the Contractor shall promptly notify the 3858 TO/CO's Technical Representative (COTR) and provide the information required by Section G of this 3859 contract. After the initial one hundred eighty (180) day period, all proposed substitutions of key 3860 personnel must be submitted in writing, at least thirty (30) business days in advance of the proposed 3861 substitution, to the TO/CO except as provided herein. This provision also applies to personnel engaged 3862 by the Contractor's teaming partners and/or subcontractors if they are designated as key personnel.

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H.8 SPECIAL HIRING REQUIREMENT

The Government is committed to using the services provided by individuals who are blind or severely handicapped through organizations affiliated with the Committee for Purchase From People Who Are Blind or Severely Disabled (National Industries for the Blind [NIB] and National Industries for the Severely Handicapped [NISH]) to fulfill part of the staffing requirements for this contract. Contractor-provided personnel shall consist of a minimum of five (5) percent of individuals employed through organizations affiliated with NIB and/or NISH. The Contractor is responsible for working with NIB and/or NISH affiliated agencies to recruit, hire, and train these individuals to ensure that performance objectives are not compromised. The Contractor is responsible for compensating NIB/NISH affiliated organizations for any work performed to recruit, hire, train, and retain these individuals for the performance of each task.

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H.9 INFORMATION SPECIALISTS HOURLY RATE

The unit of measure for the Hourly Information Specialist (IS) Rate is "HOUR" and refers to a "worked" hour. "Worked" time is defined as all time expended by an IS:

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- o gathering, researching, composing, or delivering responses to customer inquires;
- o listening to, or actively communicating with, customers;
- o in performance of post inquiry work (such as updating systems or conducting follow up activities);
- o in the available (to respond to a call or inquiry) mode *;
- o while receiving instruction or coaching *;
- o while on breaks *; and
- o while attending task-related meetings *.

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Activities denoted with * are not accounted for nor reimbursed as "work time" under Information Specialist Hourly Rate for Shared or Non-Dedicated Response Services.

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H.10 PLACE OF PERFORMANCE

- The work to be performed by the Contractor can be categorized as follows:
- 3896 o Start-up and implementation;

- 3897 o Contact center operations and management; and 3898 Project management 3899 3900 Work performed during start-up can take place at the Contractor's facilities or on Government premises. 3901 Work performed for contact center operations and management shall take place primarily at one or more 3902 locations designated by the Contractor. Work performed for Project Management shall take place 3903 primarily at the Contractor's premises. 3904 3905 3906 H.11 FEDERAL HOLIDAYS 3907 The following days are considered Federal holidays and will be observed by the Contractor(s) in 3908 performance of work under each task order: 3909 3910 o New Year's Day (January 1) 3911 Martin Luther King, Jr., Day (3rd Monday in January) Washington's Birthday (3rd Monday in February) 3912 Memorial Day (Last Monday in May) 3913 Independence Day (July 4th) 3914 3915 Labor Day (1st Monday in September) Columbus Day (2nd Monday in October) 3916 3917 Veterans Day (November 11) 3918 Thanksgiving Day (4th Thursday in November) Christmas Day (December 25th) 3919 3920 3921 If any of the above holidays falls on a Saturday, then the preceding Friday is the holiday. If any of the 3922 above holidays falls on a Sunday, then the following Monday is the holiday. 3923 3924 In addition to the days designated above as holidays, the Government observes the following as non-3925 working days: 3926 3927 o Any other day designated by Federal Statute 3928 Any day designated by Executive Order 3929 Any other day designated by the President's Proclamation 3930 3931 Contractor personnel shall work in accordance with the Government's designated holiday schedule unless 3932 otherwise stated specifically in the task order. 3933
- 3934 *NOTE:* Additional non-working days are sometimes authorized, but these are regional in nature (e.g., 3935 Inauguration Day in Washington, DC) and not included as Federal holidays for the purposes of this contract.

H.12 SYSTEMS REQUIREMENTS

The Contractor shall provide and maintain robust and scalable state-of-the-art multi-channel contact center system hardware, software, and accessories to meet task order requirements. The Contractor shall provide a commercial off-the-shelf (COTS) solution that meets the Government requirements. The system shall be adequately sized and equipped to handle fluctuations in the volume of inquiries received. The system shall be configured such that it can easily be expanded to accommodate growth in call volume; electronic and written inquiries, electronic transactions, automated voice responses and FAQ services; knowledge base; inquiry tracking; data storage and retrieval; automatic fax-back; and other affected areas. The systems shall have adequate backup capability to maximize availability and reliability of all services.

When Earned Value Management (EVM) is determined to be applicable to individual task orders issued under this contract, the requirements of Federal Acquisition Regulation: 52.234-02 Notice of Earned Value Management System Pre-Award; 52.234-03 Notice of Earned Value Management System; and 52.234-04 Earned Value Management System will apply.

H.13 PERMITS

The Contractor shall, without additional expense to the Government, be responsible for obtaining all necessary licenses and permits in connection with the performance of this contract. The Contractor shall also be responsible for complying with any applicable Federal, state, and municipal laws, codes, or regulations.

H.14 TELECOMMUNICATIONS INTERFACE

The Government may provide its own telecommunication services to connect to the Contractor's facilities. The type of telecommunications access provided shall be at the discretion of the Government. After task order award, the Government will determine what solution is the most efficient and cost effective and will decide at that time what type of telecommunications access to use. If the Government requires an interface other than the one detailed by the Contractor in its Technical Proposal, the TO/CO and the Contractor may negotiate an equitable adjustment to the task order amount.

H.15 TRAVEL

H.15.1 Routine Travel

Neither Contractor nor subcontractor employees will not be reimbursed for commuter travel for employees between their residences and their regular assigned duty stations, or for travel in support of project start-up and the day-to-day performance of this contract. A regular assigned duty station is defined as the Contractor employee's continuing place of duty, whether the assignment is permanent or temporary.

H.15.2 Non-Routine Travel

Non-routine travel directed by the Government will require the advance written approval of the TO/CO or his/her designee, and will be reimbursed as ODC expense. Reimbursement shall not exceed the rates and expenses allowed by Federal Travel Regulations (see http://www.gsa.gov "Federal Travel Regulation") to

a Government employee traveling under identical circumstances. The Contractor shall comply with the more restrictive of its own internal policies or with the Government's policies for making reimbursable travel and per-diem expenditures. The Government will supply the Contractor with a copy of its travel policies upon award of each task order issued under this contract or they may be accessed online as noted above. Note: if the task order is issued on a time and materials, or labor-hour basis, the provisions of Federal Acquisition Regulation 16.601 apply.

H.16 CONTINGENCIES

The Contractor shall ensure continuity of call center operations, and shall be entirely responsible for maintaining continuity of support for the assigned tasks. Contractor employment and staffing difficulties will not be acceptable justification for failure to meet the requirements of the Performance Work Statement, Section C of this contract.

If required by the task order request for proposal, Contractor shall submit a contingency plan to the TO/CO's Technical Representative (COTR) for approval by the task order start date. The plan shall outline the Contractor's response to operational problems and its anticipated response to unusual events that may occur during the life of the task order and disrupt operations (such as a structural fire, accident, terrorist attack, personnel strike, extended power failure, etc.) which may require the Contractor to proceed under altered work conditions at locations other than those originally established. The Contractor shall continue to provide the services required by the contract, as directed by the COTR, for the duration of such an emergency situation.

H.17 COMPLIANCE WITH SECTION 508

The services requested under this contract are to be accessed by callers/users employing various technologies, including, but not limited to: touch-tone and rotary/dial-pulse telephones, TDD/TTY devices, mobile and wireless telephones, wireless communications devices, facsimile equipment, portable and desktop computers, and Internet appliances. Callers/users may use these devices to access the requested services via the telephone network, mobile and wireless network, the Internet, or other communications media. The Government requires that the information and services provided by the Contractor under this contract be made available in accessible formats.

The Contractor shall ensure that the technology infrastructure and support services provided are fully accessible by individuals with disabilities as required by Section 508 of the Rehabilitation Act Amendments of 1998. All Electronic and Information Technology systems provided under this contract must meet the applicable accessibility standards established in 36 CFR 1194, unless an agency exception to this requirement exists. 36CFR 1194 implements Section 508 of the Rehabilitation Act of 1973, as amended, and is viewable at http://www.section508.gov – E & IT Requirements.

H.18 CONSTRUCTIVE CHANGE ORDERS

No order, statement, or conduct of the TO/CO, authorized representative(s) of the TO/CO, or any other representative of the Government, whether or not the individual is acting within the limits of his/her authority shall constitute a change under the "Changes" clause of this contract, or entitle the Contractor to an equitable adjustment of the task order price or delivery schedule unless such change is issued in writing and signed by the TO/CO. No representative of the TO/CO shall be authorized to issue a written

change order under the "Changes" clause of this contract. The Contractor shall be under no obligation to comply with any orders or directions not issued in writing and signed by the TO/CO.

H.19 GOVERNMENT OBSERVATIONS

Prior to the award of a task order, the TO/CO and the task order's COTR will develop a Quality Assurance Evaluation (QAE) plan designed to evaluate the quality of service being provided to Government. The QAE plan will be used in conjunction with the performance standards set forth in the task order's statement of objectives. The QAE process will include such things as: sampling of services; a method of inspecting the sample; the frequency of such inspections; documentation of the QAE findings; feedback from customers; the minutes of meetings with the Contractor (periodic and ad hoc); Contractor response to evaluation findings and the corrective action(s) instituted, if any. The process will form the basis for determining the acceptability of services provided under the Inspection of Services clause of the contract.

In addition, Government safety officials and other agency officials reserve the right to conduct surveys and inspections of operations and facilities. Other Government personnel, such as Inspector General's staff, are authorized to observe Contractor performance and records. In addition, the Government may use third-party Contractor personnel to provide various forms of service, such as audits or customer surveys. Any such Contractor personnel will be required to sign non-disclosure agreements to protect each contract holder's procurement-sensitive information. These personnel will not interfere with the Contractor's performance, and the Contractor shall provide all such personnel with its full cooperation. All comments concerning the Contractor's operations will be provided to the COTR. Findings from any audit, report, survey, etc. may be provided to the TO/CO, as deemed appropriate by the COTR.

H.20 ADMINISTRATIVE IMPROVEMENTS/SERVICE ENHANCEMENTS

It is the intention of the Government to work with the Contractor to introduce administrative improvements and service enhancements that would be advantageous to the Government and the Contractor. The Contractor agrees to negotiate in good faith with the Government to implement any suggested administrative improvements or service enhancements that are determined to be in the best interests of both parties.

H.21 TASK ORDER PHASE-OUT PROCEDURES

At the conclusion of a task order, the Government may require the Contractor to participate in a task order phase-out process. If the Government so directs, the following procedures will apply:

After the Government's selection of a successor Contractor, but prior to the end of the expiring task order, the current Contractor and the successor Contractor will jointly prepare a mutually agreeable detailed plan for the transition to the successor Contractor.

The current Contractor agrees to provide, if required in writing by the Government, transitional services for a period of up to ninety (90) days after the expiration of the current task order at the then current task order prices. Continuity for all operations required under the task order shall be maintained during that period.

H.22 DISCLOSURE OF INFORMATION

Any Government information made available to the Contractor or gathered by the Contractor from Government employees or customers shall be used only for the purpose of carrying out the provisions of this contract, and shall not be divulged or made known in any manner to any person except as may be necessary in the performance of task requirements. Furthermore, no article, book, pamphlet, recording, broadcast, speech, television appearance, film, or photograph concerning any aspect of work performed under this contract shall be published or disseminated through any medium without prior written authorization from the Government. These obligations do not cease upon expiration or termination of this contract. The Contractor shall include the substance of this provision in all contracts for employment and subcontracting work performed under this contract.

In performance of this contract, the Contractor agrees to assume responsibility for protecting the confidentiality of Government information, and for ensuring that all work is performed under the supervision of the Contractor or the Contractor's responsible employees. The Contractor shall keep confidential information provided by inquirers consistent with Federal law, primarily the Privacy Act of 1974 and the Freedom of Information Act and their amendments. The Contractor shall not disclose personal identification information (e.g. name, address, telephone number) or personal financial information (e.g. credit card account number) of an inquirer without the verbal or written consent of the inquirer, provided that such verbal consent is recorded.

Inquirers who make threats against persons or property, either Government or private, may have already forfeited their rights to privacy thereby. The Contractor shall work with the appropriate Government law enforcement agency(ies) for the prevention of threatened crime on a case-by-case basis.

Each employee of the Contractor to whom information may be made available or disclosed shall be notified in writing by the Contractor that information disclosed to such employee can be used only for the purpose and to the extent authorized herein. Use of such information for a purpose or to an extent not authorized herein may subject the offender to criminal sanctions imposed by 18 United States Code (U.S.C.) 641. The law provides, in pertinent part, that whoever knowingly converts to their use or to the use of another, or without authority sells, conveys, or disposes of any record of the United States, or whoever receives the same with intent to convert it to his/her use or gain, knowing it to have been converted, shall be guilty of a crime punishable by a fine of up to \$10,000, or imprisonment up to 10 years, or both.

The limitations noted in the preceding paragraphs do not apply to information which has been made public by the Government. Further, this provision does not preclude the use of any information independently acquired by the Contractor without such limitations, or prohibit an agreement, at no cost to the Government, between the Contractor and the information owner, which provides for greater rights to the Contractor.

H.23 LIABILITY

H.23.1 Performance Liability

The Contractor will not be liable for any form of consideration when the failure to provide service or meet contract requirements arises from causes beyond the control and without the fault or negligence of the Contractor. Examples of such causes include:

o Acts of God or of the public enemy

- 4128 o Fires
- 4129 o Floods
- o Epidemics
- 4131 o Quarantine restrictions
- o Freight embargoes
- 4133 o Unusually severe weather
- o Denial of access by a third party

4135 H.23.2 Information Liability

The Contractor shall be solely responsible for damages suffered by the public that result from the use and/or dissemination of information not previously approved by the Government during the performance of this contract. Information to be supplied by the Government, along with the approval process required for adding new and/or updating existing information, will be specified in individual task orders.

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H.24 HOLD HARMLESS AND IMDENNIFICATION

The Contractor shall save, hold harmless, and indemnify the Government against any and all liability, claims, and costs of whatever kind or nature for injury to or death of any person or persons, and for loss, destruction, or damage to any property (including electronic storage areas), occurring in connection with or in any way incident to or arising out of the occupancy, use, service, operations, or performance of work under the terms of this contract, resulting in whole or in part from the willful, negligent, or careless acts or omissions of the Contractor, its subcontractors, or any employee, agent, or representative of the Contractor or its subcontractors.

H.25 OWNERSHIP OF DATA

During the course of this contract, the Contractor will create and maintain databases that are used in support of processing inquiries, and contain information such as scripted responses, topical information entries, business rules, preformatted responses, personal information, transaction histories, and agency contacts. The Contractor may also capture and store certain inquiry data in Contractor-provided and/or Government-provided databases. All of this information is the property of the Government. At the conclusion of each task order issued under this contract, or upon termination of this contract, all information resources developed in support of the task(s), including any databases or associated formats or call tools, shall be turned over to the Government in their entirety. Should a task order terminate for any reason, the Contractor shall arrange for the timely transfer of such data records to the Government. The Contractor may not keep any information resources or paper or electronic copies of information without the express written consent of the Contracting Officer's Technical Representative. If the supporting software systems are not commercially available at that time, the Contractor shall sell or license the software to the agency at a good faith mutually agreed upon price. Failure on the part of the Contractor to negotiate such pricing in good faith, or to provide such software on demand shall be subject to the Disputes clause of this contract.

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H.26 NEWS RELEASES

News releases pertaining to task orders issued under this contract shall not be made by the Contractor without the prior written approval of the ACO or his/her designee. A minimum of 48 hours' notice is required to respond to Contractor requests for approval to release contract-related information to the news media. The Contractor's request shall contain a copy of the specific information for which the Contractor is seeking approval to release, and a description of the intended form of release.

H.27 ELECTRONIC ACCESS TO THE CONTRACT

The Contractor is hereby advised that, in compliance with the Freedom of Information Act, a redacted version of the contract and all modifications thereto will be made available on the Internet.

The Contractor shall submit both a redacted version and a non-redacted version of the contract to the ACO within fifteen (15) business days after contract award. Each version shall be submitted in both "Adobe .pdf" format and in "Microsoft Word" format. The redacted version shall be prepared in accordance with Freedom of Information Act guidance and will be approved by the ACO before release.

This process shall be repeated each time a modification to the contract is awarded.

H.28 MARKETING EFFORTS

The Contractor is responsible for ongoing marketing efforts during the life of this contract as specified below. Such efforts will commence not later than thirty (30) calendar days after contract award, subject to the following:

o All marketing brochures shall conform to the requirements of the GSAR 552.203-70 and be approved by the ACO prior to issuance

o Contractors shall not assist prospective client agencies in the development of future requirements, or provide preliminary estimates, except as provided for in an existing task order

o Contractors shall not include marketing expenses as a direct cost item

o Approval for marketing by the Contractor does not obligate GSA to undertake, under this contract, any potential work identified

H.28.1 Marketing Calls

The Contractor shall prepare and give formal or informal presentations to prospective GSA clients on the contract when requested by the Government. These presentations will be consistent with materials previously reviewed and approved for use by GSA.

H.28.2 Marketing Materials

- The Contractor shall provide marketing materials which will enhance program and service visibility. The types of marketing materials provided shall be at the discretion of the Contractor, and may include the
- 4217 following: brochures, pamphlets, visual aids, newsletters, technology updates, white papers, news
- 4218 releases, training tools and seminars, work tools and materials such as quick reference

estimating/measuring tools, folders, pens, mouse pads, rolodex cards, and literature. The Contractor shall provide sample marketing materials prior to distribution. GSA will have ten (10) working days to review and approve materials.

I.1 52.252-2 Clauses Incorporated by Reference (FEB 1998)

This contract incorporates the following clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make a copy of the full text available. Also, the full text of a clause may be accessed electronically at this/these address(es): http://www.arnet.gov/far.

I.1.1 FEDERAL ACQUISITION REGULATION (48 CFR, APR 1984) CLAUSES

Clause No.	Clause Title	Date
52.202-01	Definitions	DEC 2001
52.203-03	Gratuities	APR 1984
52.203-05	Covenant Against Contingent Fees	APR 1984
52.203-06	Restrictions on Subcontractor Sales to the Government	SEP 2006
52.203-07	Anti-Kickback Procedures	JUL 1995
52.203-08	Cancellations, Restrictions and Recovery of Funds for Illegal or Improper Activity	JAN 1997
52.203-10	Price or Fee Adjustment for Illegal or Improper Activity	JAN 1997
52.203-12	Limitation on Payments to Influence Certain Federal Transactions	SEP 2005
52.204-04	Printed or Copied Double-Sided on Recycled Paper	AUG 2000
52.209-06	Protecting the Government's Interest When Subcontracting with Contractors Debarred, Suspended or Proposed for Debarment	SEP 2006
52.215-02	Audit and Records—Negotiation	JUN 1999
52.215-08	Order of Precedence—Uniform Contract Format	OCT 1997
52.215-17	Waiver of Facilities Capital Cost of Money	OCT 1997
52-215-21	Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data—Modifications	OCT 1997
52-216-18	Ordering	OCT 1995

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FEDERAL ACQUISITION REGULATION CLAUSES, continued

Clause No. **Clause Title Date** 52.216-19 **Order Limitations** OCT 1995 52-216-22 **Indefinite Quantity** OCT 1995 52.217-08 Option to Extend Services NOV 1999 52.217-09 Option to Extend the Term of the Contract MAR 2000 52.219-04 Notice of Price Evaluation Preference for HUB Zone Small Business JUL 2005 Concerns Utilization of Small Business Concerns 52.219-08 MAY 2004 52-219-09 Small Business Subcontracting Plan (Alternate II (JAN 2002)) **SEP 2006** Liquidated Damages—Subcontracting Plan JAN 1999 52.219-16 52.219.23 Notice of Price Evaluation Adjustment for Small Disadvantaged **SEP 2005 Business Concerns** 52.222-01 Notice to the Government of Labor Disputes FEB 1997 52.222-03 Convict Labor JUN 2003 52.222-04 Contract Work Hours and Safety Standards Act—Overtime JUL 2005 Compensation 52.222-21 Prohibition of Segregated Facilities FEB 1999 52.222-26 **Equal Opportunity** APR 2002 52.222-29 Notification of Visa Denial JUN 2003 52.222-35 Equal Opportunity for Special Disabled Veterans, Veterans of the **SEP 2006** Vietnam Era, and Other Eligible Veterans Affirmation action for Workers with Disabilities 52.222-36 JUN 1998 52.222-37 Employment Reports on Special Disabled Veterans, Veterans of the SEP 2006 Vietnam Era, and Other Eligible Veterans 52.222-41 Service Contract Act of 1965, As Amended JUL 2005 52.222-43 Fair Labor Standards Act and Service Contract Act—Price Adjustment NOV 2006 (Multiple Year and Option Contracts) Service Contract Act—Place of Performance Unknown 52.222-49 **MAY 1989**

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FEDERAL ACQUISITION REGULATION CLAUSES, continued

Clause No.	<u>Clause Title</u>	<u>Date</u>
52.223-06	Drug-Free Workplace	MAY 2001
52.223-13	Certification of Toxic Chemical Release Reporting	AUG 2003
52.223-14	Toxic Chemical Release Reporting	AUG 2003
52.224-01	Privacy Act Notification	APR 1984
52.224-02	Privacy Act	APR 1984
52.225-13	Restrictions on Certain Foreign Purchases	FEB 2006
52.227-01	Authorization and Consent	JUL 1995
52.227-03	Patent Indemnity	APR 1984
52.227-14	Rights in Data—General (Alternate II (JUN 1987))	JUN 1987
52.227-23	Rights to Proposal Data (Technical)	JUN 1987
52.232-01	Payments	APR 1984
52.232-07	Payments – Time-And-Materials and Labor-Hours Contracts	FEB 2007
52.232-08	Discounts for Prompt Payments	FEB 2002
52.232-09	Limitation on Withholding of Payments	APR 1984
52.232-11	Extras	APR 1984
52.232-17	Interest	JUN 1996
52.232-18	Availability of Funds	APR 1984
52.232-23	Assignment of Claims	JAN 1986
52.232-33	Payment by Electric Funds Transfer—Central Contractor Registration	OCT 2003
52.232-37	Multiple Payment Arrangements	MAY 1999
52.233-01	Disputes (Alternate I (DEC 1991))	JUL 2002
52.233-02	Service of Protest	SEP 2006
52.233-03	Protest after Award	AUG 1996
52.233-04	Applicable Law for Breach of Contract Claim	OCT 2004
52.234-02	Notice of Earned Value Management System Pre-Award	JUL 2006

FEDERAL ACQUISITION REGULATION CLAUSES, continued

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Clause No.	<u>Clause Title</u>	<u>Date</u>
52.234-03	Notice of Earned Value Management System	JUL 2006
52.234-04	Earned Value Management System	JUL 2006
52.237-03	Continuity of Services	JAN 1991
52.239-01	Privacy or Security Safeguards	AUG 1996
52.242-13	Bankruptcy	JUL 1995
52.243-01	Changes—Fixed Price (Alternate II (AUG 1987))	AUG 1987
52.243-03	Changes – Time-and-Materials or Labor-Hour	SEP 2000
52.244-05	Competition in Subcontracting	DEC 1996
52.244-06	Subcontracts for Commercial Items	SEP 2006
52.245-01	Property Records	APR 1984
52.245-02	Government Property (Fixed-Price Contracts)	MAY 2004
52.245-04	Government-Furnished Property (Short Form)	JUN 2003
52.246-25	Limitation of Liability—Services	FEB 1997
52.248-01	Value Engineering	FEB 2000
52.249-01	Termination for Convenience of the Government (Fixed-Price) (Short Form)	APR 1984
52.249-08	Default (Fixed-Price Supply and Service)	APR 1984
52.252-06	Authorized Deviations in Clauses	APR 1984
52.253-01	Computer Generated Forms	JAN 1991

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I.1.2 GENERAL SERVICES ADMINISTRATION MANUAL (GSAM) CLAUSES

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4258 52.222-42 STATEMENT OF EQUIVALENT RATES FOR FEDERAL HIRES (MAY 1989)

In compliance with the Service Contract Act of 1965, as amended, and the regulations of the Secretary of Labor (29 CFR Part 4), this clause identifies the classes of service employees expected to be employed under the contract and states the wages and fringe benefits payable to each if they were employed by the contracting agency subject to the provisions of 5 U.S.C. 5341 or 5332.

4264 This Statement is for Information Only: It is not a Wage Determination

Employee Class	Monetary Wage-Fringe Benefits	
Library Technician	Wage Rate: \$13.72 / hr. Health and Welfare: \$3.16 / hr.	
Order Clerk I	Wage Rate: \$9.71 / hr. Health and Welfare: \$3.16 / hr.	
Computer Operator III	Wage Rate: \$20.69 / hr. Health and Welfare: \$3.16 / hr.	
Computer Programmer II	Wage Rate: \$26.11 / hr. Health and Welfare: \$3.16 / hr.	
Computer Systems Analyst I	Wage Rate: \$27.62 / hr. Health and Welfare: \$3.16 / hr.	
Technical Writer II	Wage Rate: \$15.23 / hr. Health and Welfare: \$3.16 / hr.	

552.203-71 RESTRICTION ON ADVERTISING (SEP 1999)

The Contractor shall not refer to this contract in commercial advertising or similar promotions in such a manner as to state or imply that the product or service provided is endorsed or preferred by the White House, the Executive Office of the President, or any other element of the Federal Government, or is considered by these entities to be superior to other products or services. Any advertisement by the Contractor, including price-off coupons, that refers to a military resale activity shall contain the following statement:

"This advertisement is neither paid for nor sponsored, in whole or in part, by any element of the United States Government."

552.215-70 EXAMINATION OF RECORDS BY GSA (FEB 1996)

The Contractor agrees that the Administrator of General Services or any duly authorized representatives shall, until the expiration of 3 years after final payment under this contract, or of the time periods for the particular records specified in Subpart 4.7 of the Federal Acquisition Regulation (48 CFR 4.7), whichever expires earlier, have access to and the right to examine any books, documents, papers, and records of the Contractor involving transactions related to this contract or compliance with any clauses thereunder. The Contractor further agrees to include in all its subcontracts hereunder a provision to the effect that the subcontractor agrees that the Administrator of General Services or any authorized representatives shall, until the expiration of 3 years after final payment under the subcontract, or of the time periods for the particular records specified in Subpart 4.7 of the Federal Acquisition Regulation (48 CFR 4.7), whichever expires earlier, have access to and the right to examine any books, documents, papers, and records of such subcontractor involving transactions related to the subcontract or compliance with any clauses there under. The term "subcontract" as used in this clause excludes (a) purchase orders not exceeding \$100,000 and (b) subcontracts or purchase orders for public utility services at rates established for uniform applicability to the general public.

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4292 4293	552.232-1	PAYMENTS (APR 1984) (DEVIATION, FAR 52.232-1)
4294 4295 4296	the service	ernment shall pay the Contractor, without submission of invoices or vouchers, 30 days after ce period, the prices stipulated in this contract for supplies delivered and accepted or endered and accepted, less any deductions provided in this contract.
4297 4298		nerwise specified in this contract, the Government will make payment on partial deliveries by the Government if either:
4299	(1) The ar	mount due on the deliveries warrants it.
4300 4301		ontractor requests it and the amount due on the deliveries is at least \$1,000 or 50 percent of al contract price.
4302 4303 4304 4305	number us	cessing payment, GSA's Finance Office will automatically generate the 12 digit invoice sing the ACT number assigned to the contract, followed by an abbreviated month and year (e.g., 84261554JUN7, for June 1997). The ACT number appears on the contract award
4306	552.232-25	PROMPT PAYMENT (JUL 1998) (DEVIATION FAR 52.232-25)
4307 4308 4309 4310 4311 4312 4313	and contract fi considered as Definitions of days referred t	ng any other payment clause in this contract, the Government will make invoice payments nancing payments under the terms and conditions specified in this clause. Payment shall be being made on the day a check is dated or the date of an electronic funds transfer. pertinent terms are set forth in section 32.902 of the Federal Acquisition Regulation. All to in this clause are calendar days, unless otherwise specified. (However, see subparagraph lause concerning payments due on Saturdays, Sundays, and legal holidays.)
4314	(a) Invoice pa	yments.
4315	(1) The du	ue date for making invoice payments by the designated payment office is:
4316 4317 4318	Su	or orders placed electronically by the General Services Administration (GSA) Federal apply Service (FSS), and to be paid by GSA through electronic funds transfer (EFT), the ter of the following two events:
4319 4320 4321 4322 4323 4324		(A) The 10th day after the designated billing office receives a proper invoice from the Contractor. If the designated billing office fails to annotate the invoice with the date of receipt at the time of receipt, the invoice payment due date shall be the 10th day after the date of the Contractor's invoice; provided the Contractor submitted a proper invoice and no disagreement exists over quantity, quality, or Contractor compliance with contract requirements.
4325 4326		(B) The 10th day after Government acceptance of supplies delivered or services performed by the Contractor.
4327	(ii) Fo	or all other orders, the later of the following two events:

(A) The 30th day after the designated billing office receives a proper invoice from the

Contractor. If the designated billing office fails to annotate the invoice with the date

of receipt at the time of receipt, the invoice payment due date shall be the 30th day

after the date of the Contractor's invoice; provided the Contractor submitted a proper

4332 4333	invoice and no disagreement exists over quantity, quality, or Contractor compliance with contract requirements.
4334 4335	(B) The 30th day after Government acceptance of supplies delivered or services performed by the Contractor.
4336 4337	(iii) On a final invoice, if the payment amount is subject to contract settlement actions, acceptance occurs on the effective date of the contract settlement.
4338 4339 4340	(2) The General Services Administration will issue payment on the due date in (a)(1)(i) above if the Contractor complies with full cycle electronic commerce. Full cycle electronic commerce includes all the following elements:
4341 4342	(i) The Contractor must receive and fulfill electronic data interchange (EDI) purchase orders (transaction set 850).
4343 4344 4345	(ii) The Contractor must generate and submit to the Government valid EDI invoices (transaction set 810) or submit invoices through the GSA Finance Center Internet-based invoice process. Internet-based invoices must be submitted using procedures provided by GSA.
4346 4347	(iii) The Contractor's financial institution must receive and process, on behalf of the Contractor, EFT payments through the Automated Clearing House (ACH) system.
4348 4349	(iv) The EDI transaction sets in (i) through (iii) above must adhere to implementation conventions provided by GSA.
4350 4351	(3) If any of the conditions in (a)(2) above do not occur, the 10 day payment due dates in (a)(1) become 30 day payment due dates.
4352	(4) Certain food products and other payments.
4353 4354 4355	(i) Due dates on Contractor invoices for meat, meat food products, or fish; perishable agricultural commodities; and dairy products, edible fats or oils, and food products prepared from edible fats or oils are—
4356 4357 4358 4359 4360	(A) For meat or meat food products, as defined in section 2(a)(3) of the Packers and Stockyard Act of 1921 (7 U.S.C. 182(3)), and as further defined in Pub. L. 98-181, including any edible fresh or frozen poultry meat, any perishable poultry meat food product, fresh eggs, and any perishable egg product, as close as possible to, but not later than, the 7th day after product delivery.
4361 4362 4363	(B) For fresh or frozen fish, as defined in section 204(3) of the Fish and Seafood Promotion Act of 1986 (16 U.S.C. 4003(3)), as close as possible to, but not later than, the 7th day after product delivery.
4364 4365 4366 4367	(C) For perishable agricultural commodities, as defined in section 1(4) of the Perishable Agricultural Commodities Act of 1930 (7 U.S.C. 499a(4)), as close as possible to, but not later than, the 10th day after product delivery, unless another date is specified in the contract.

4368 (D) For dairy products, as defined in section 111(e) of the Dairy Production Stabilization Act of 1983 (7 U.S.C. 4502(e)), edible fats or oils, and food products prepared from 4369 edible fats or oils, as close as possible to, but not later than, the 10th day after the 4370 date on which a proper invoice has been received. Liquid milk, cheese, certain 4371 4372 processed cheese products, butter, yogurt, ice cream, mayonnaise, salad dressings, 4373 and other similar products, fall within this classification. Nothing in the Act limits 4374 this classification to refrigerated products. When questions arise regarding the proper 4375 classification of a specific product, prevailing industry practices will be followed in specifying a contract payment due date. The burden of proof that a classification of a 4376 4377 specific product is, in fact, prevailing industry practice is upon the Contractor making 4378 the representation. 4379 (ii) If the contract does not require submission of an invoice for payment (e.g., periodic lease 4380 payments), the due date will be as specified in the contract. 4381 (5) Contractor's invoice. The Contractor shall prepare and submit invoices to the designated billing office specified in the contract. Notwithstanding paragraph (g) of the clause at FAR 52.212-4, 4382 4383 Contract Terms and Conditions—Commercial Items, if the Contractor submits hard-copy 4384 invoices, submit only an original invoice. No copies of the invoice are required. A proper invoice must include the items listed in subdivisions (a)(5)(i) through (a)(5)(viii) of this clause. If the 4385 4386 invoice does not comply with these requirements, it shall be returned within 7 days after the date the designated billing office received the invoice (3 days for meat, meat food products, or fish; 5 4387 4388 days for perishable agricultural commodities, edible fats or oils, and food products prepared from 4389 edible fats or oils), with a statement of the reasons why it is not a proper invoice. Untimely 4390 notification will be taken into account in computing any interest penalty owed the Contractor in 4391 the manner described in subparagraph (a)(5) of this clause. 4392 (i) Name and address of the Contractor. 4393 (ii) Invoice date. (The Contractor is encouraged to date invoices as close as possible to the date of 4394 the mailing or transmission.) 4395 (iii) Contract number or other authorization for supplies delivered or services performed 4396 (including order number and contract line item number). 4397 (iv) Description, quantity, unit of measure, unit price, and extended price of supplies delivered or 4398 services performed. 4399 (v) Shipping and payment terms (e.g., shipment number and date of shipment, prompt 4400 payment discount terms). Bill of lading number and weight of shipment will be shown for 4401 shipments on Government bills of lading. 4402 Name and address of Contractor official to whom payment is to be sent (must be the same (vi) 4403 as that in the contract or in a proper notice of assignment). 4404 Name (where practicable), title, phone number, and mailing address of person to be

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shipment).

notified in the event of a defective invoice.

(viii) Any other information or documentation required by the contract (such as evidence of

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- 4408 (ix) While not required, the Contractor is strongly encouraged to assign an identification number to each invoice.
 - (6) Interest penalty. An interest penalty shall be paid automatically by the designated payment office, without request from the Contractor, if payment is not made by the due date and the conditions listed in subdivisions (a)(6)(i) through (a)(6)(iii) of this clause are met, if applicable. However, when the due date falls on a Saturday, Sunday, or legal holiday when Federal Government offices are closed and Government business is not expected to be conducted, payment may be made on the following business day without incurring a late payment interest penalty.
 - (i) A proper invoice was received by the designated billing office.
 - (ii) A receiving report or other Government documentation authorizing payment was processed, and there was no disagreement over quantity, quality, or Contractor compliance with any contract term or condition.
 - (iii) In the case of a final invoice for any balance of funds due the Contractor for supplies delivered or services performed, the amount was not subject to further contract settlement actions between the Government and the Contractor.
 - (7) Computing penalty amount. The interest penalty shall be at the rate established by the Secretary of the Treasury under section 12 of the Contract Disputes Act of 1978 (41 U.S.C. 611) that is in effect on the day after the due date, except where the interest penalty is prescribed by other Governmental authority (e.g., tariffs). This rate is referred to as the `Renegotiation Board Interest Rate," and it is published in the Federal Register semiannually on or about January 1 and July 1. The interest penalty shall accrue daily on the invoice principal payment amount approved by the Government until the payment date of such approved principal amount; and will be compounded in 30-day increments inclusive from the first day after the due date through the payment date. That is, interest accrued at the end of any 30-day period will be added to the approved invoice principal payment amount and will be subject to interest penalties if not paid in the succeeding 30-day period. If the designated billing office failed to notify the Contractor of a defective invoice within the periods prescribed in subparagraph (a)(5) of this clause, the due date on the corrected invoice will be adjusted by subtracting from such date the number of days taken beyond the prescribed notification of defects period. Any interest penalty owed the Contractor will be based on this adjusted due date. Adjustments will be made by the designated payment office for errors in calculating interest penalties.
 - (i) For the sole purpose of computing an interest penalty that might be due the Contractor, Government acceptance shall be deemed to have occurred constructively on the 7th day (unless otherwise specified in this contract) after the Contractor delivered the supplies or performed the services in accordance with the terms and conditions of the contract, unless there is a disagreement over quantity, quality, or Contractor compliance with a contract provision. In the event that actual acceptance occurs within the constructive acceptance period, the determination of an interest penalty shall be based on the actual date of acceptance. The constructive acceptance requirement does not, however, compel Government officials to accept supplies or services, perform contract administration functions, or make payment prior to fulfilling their responsibilities.
 - (ii) The following periods of time will not be included in the determination of an interest penalty:
 - (A) The period taken to notify the Contractor of defects in invoices submitted to the Government, but this may not exceed 7 days (3 days for meat, meat food products,

4452 4453	or fish; 5 days for perishable agricultural commodities, dairy products, edible fats or oils, and food products prepared from edible fats or oils).
4454 4455	(B) The period between the defects notice and resubmission of the corrected invoice by the Contractor.
4456 4457	(C) For incorrect electronic funds transfer (EFT) information, in accordance with the EFT clause of this contract.
4458 4459 4460	(iii) Interest penalties will not continue to accrue after the filing of a claim for such penalties under the clause at 52.233-1, Disputes, or for more than 1 year. Interest penalties of less than \$1 need not be paid.
4461 4462 4463 4464 4465	(iv) Interest penalties are not required on payment delays due to disagreement between the Government and the Contractor over the payment amount or other issues involving contract compliance or on amounts temporarily withheld or retained in accordance with the terms of the contract. Claims involving disputes, and any interest that may be payable, will be resolved in accordance with the clause at 52.233-1, Disputes.
4466 4467 4468 4469 4470	(8) Prompt payment discounts. An interest penalty also shall be paid automatically by the designated payment office, without request from the Contractor, if a discount for prompt payment is taken improperly. The interest penalty will be calculated as described in subparagraph (a)(7) of this clause on the amount of discount taken for the period beginning with the first day after the end of the discount period through the date when the Contractor is paid.
4471	(9) Additional interest penalty.
4472 4473 4474	(i) If this contract was awarded on or after October 1, 1989, a penalty amount, calculated in accordance with subdivision (a)(9)(iii) of this clause, shall be paid in addition to the interest penalty amount if the Contractor
4475	(A) Is owed an interest penalty of \$1 or more;
4476 4477	(B) Is not paid the interest penalty within 10 days after the date the invoice amount is paid; and
4478 4479 4480	(C) Makes a written demand to the designated payment office for additional penalty payment, in accordance with subdivision (a)(9)(ii) of this clause, postmarked not later than 40 days after the invoice amount is paid.
4481 4482	(ii) (A) Contractors shall support written demands for additional penalty payments with the following data. No additional data shall be required. Contractors shall—
4483 4484 4485	(1) Specifically assert that late payment interest is due under a specific invoice, and request payment of all overdue late payment interest penalty and such additional penalty as may be required;
4486 4487	(2) Attach a copy of the invoice on which the unpaid late payment interest was due; and
4488 4489	(3) State that payment of the principal has been received, including the date of receipt.
4490 4491	(B) Demands must be postmarked on or before the 40th day after payment was made, except that

4492 (1) If the postmark is illegible or nonexistent, the demand must have been received 4493 and annotated with the date of receipt by the designated payment office on or 4494 before the 40th day after payment was made; or 4495 (2) If the postmark is illegible or nonexistent and the designated payment office fails 4496 to make the required annotation, the demand's validity will be determined by the 4497 date the Contractor has placed on the demand; provided such date is no later than 4498 the 40th day after payment was made. 4499 (iii) (A) The additional penalty shall be equal to 100 percent of any original late payment 4500 interest penalty, except--4501 (1) The additional penalty shall not exceed \$5,000; 4502 (2) The additional penalty shall never be less than \$25; and 4503 (3) No additional penalty is owed if the amount of the underlying interest penalty is 4504 less than \$1. 4505 (B) If the interest penalty ceases to accrue in accordance with the limits stated in 4506 subdivision (a)(5)(iii) of this clause, the amount of the additional penalty shall be 4507 calculated on the amount of interest penalty that would have accrued in the absence 4508 of these limits, subject to the overall limits on the additional penalty specified in 4509 subdivision (a)(7)(iii)(A) of this clause. 4510 (C) For determining the maximum and minimum additional penalties, the test shall be the 4511 interest penalty due on each separate payment made for each separate contract. The 4512 maximum and minimum additional penalty shall not be based upon individual 4513 invoices unless the invoices are paid separately. Where payments are consolidated for 4514 disbursing purposes, the maximum and minimum additional penalty determination shall be made separately for each contract therein. 4515 4516 (D) The additional penalty does not apply to payments regulated by other Government 4517 regulations (e.g., payments under utility contracts subject to tariffs and regulation). 4518 (b) Contract financing payments. 4519 (1) Due dates for recurring financing payments. If this contract provides for contract financing, 4520 requests for payment shall be submitted to the designated billing office as specified in this 4521 contract or as directed by the Contracting Officer. Contract financing payments shall be made 4522 on the [insert day as prescribed by Agency head; if not prescribed, insert 30th day] day after 4523 receipt of a proper contract financing request by the designated billing office. In the event that 4524 an audit or other review of a specific financing request is required to ensure compliance with the 4525 terms and conditions of the contract, the designated payment office is not compelled to make 4526 payment by the due date specified. 4527 (2) Due dates for other contract financing. For advance payments, loans, or other arrangements 4528 that do not involve recurring submissions of contract financing requests, payment shall be made 4529 in accordance with the corresponding contract terms or as directed by the Contracting Officer. 4530 (3) Interest penalty not applicable. Contract financing payments shall not be assessed an interest 4531 penalty for payment delays. 4532 (c) Fast payment procedure due dates. If this contract contains the clause at 52.213-1, Fast Payment

552.232-70 INVOICE REQUIREMENTS (SEP 1999)

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4534 4535 Procedure, payments will be made within 15 days after the date of receipt of the invoice.

- 4536 (a) Invoices shall be submitted in an original only, unless otherwise specified, to the designated billing office specified in this contract or order.
- (b) <u>Invoices must include the Accounting Control Transaction (ACT) number provided below or on the order.</u>
- 4540 ACT Number (*To be provided on each, individual Task Order*)
- 4541 (c) In addition to the requirements for a proper invoice specified in the Prompt Payment clause of this contract or order, the following information or documentation must be submitted with each invoice:
- 4543 (As may be required on individual Task Orders).

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- 4545 **552,232-78 PAYMENT INFORMATION (JUL 2000)**
- The General Services Administration (GSA) makes information on contract payments available electronically at http://www.finance.gsa.gov. The Contractor may register at the site and review its record of payments. This site provides information only on payments made by GSA, not by other agencies.

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- 4550 552.252-6 AUTHORIZED DEVIATIONS IN CLAUSES (DEVIATION FAR 52.252-6) (SEP 1999)
- 4551 (a) Deviations to FAR clauses.
 - (1) This solicitation or contract indicates any authorized deviation to a Federal Acquisition Regulation (48 CFR Chapter 1) clause by the addition of "(DEVIATION)" after the date of the clause, if the clause is not published in the General Services Administration Acquisition Regulation (48 CFR Chapter 5).
 - (2) This solicitation indicates any authorized deviation to a Federal Acquisition Regulation (FAR) clause that is published in the General Services Administration Acquisition Regulation by the addition of "(DEVIATION [FAR clause no.])" after the date of the clause.
- 4559 (b) <u>Deviations to GSAR clauses</u>. This solicitation indicates any authorized deviation to a General Services Administration Acquisition Regulation clause by the addition of "(DEVIATION)" after the date of the clause.
- 4562 (c) "<u>Substantially the same as clauses."</u> Changes in wording of clauses prescribed for use on a "substantially the same as" basis are not considered deviations.

4565 4566	PART III – LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS
4567 4568 4569 4570 4571	SECTION J –LIST OF ATTACHMENTS
4572	ATTACHMENT 1: PAST PERFORMANCE SURVEY QUESTIONNAIRE
4573 4574 4575 4576 4577	Offerors shall forward the attached Past Performance Survey Questionnaire to customers(s) whom they have selected to complete the survey of their past performance. The offeror is responsible for communicating to the selected customer(s) the need to address the experience factors identified in Section L.7.2.1.3.1 in completing the questionnaire.
4578 4579 4580 4581	The offeror shall inform the selected customer(s) that the completed questionnaire must be received by the addressee listed on the questionnaire no later than the proposal due date set forth in Standard Form 33, Solicitation, Offeror and Award.
4582 4583	ATTACHMENT 2: SMALL BUSINESS PLAN OUTLINE (MODEL)
4584 4585 4586	All offerors that do not qualify as small business under the North American Industry Classification System code 519190 shall submit, as part of their Business Proposal a Small Business Subcontracting Plan, using the model provided in this attachment.
4587 4588 4589 4590	If assistance is required in developing a source list of firms for any of the sub-categories please contact the following:
4591 4592 4593 4594 4595	General Services Administration Office of Small Business Utilization 1800 F Street, NW Washington, D.C. 20405
4596 4597 4598	Telephone: (202) 501-1021
4599	ATTACHMENT 3: TECHNICAL PROPOSAL INDEX
4600 4601 4602 4603 4604	Offerors shall use the outline in Attachment 3 in preparing a proposal index referencing the page and paragraph numbers that contain their response on an item by item basis to all requirements of this solicitation.



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Attachment 1: Past Performance Questionnaire (Page 1 of 4)

4606 4607 4608	Name of Vendor:
Customer	Contact Information:
Name:	Position:
Company	Name:
Phone:	E-Mail:
Project Do complexity	escription: (Provide a brief description of the project, including scope of work, complexity of inquiries, length of Customer Service Representative training, y of start-up process, and work volume fluctuations)
	ork Volume (Phone, Fax, E-mail, Chat, etc.):
Contract F	Performance Period:
Reason fo	r contract termination (if applicable):
Reasonie	



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Past Performance Questionnaire (page 2 of 4)

Performance Evaluation: On a scale of 1 to 5, with a rating of 3 being satisfactory and 5 being the highest attainable score and 1 being the lowest, please assign a rating to the Contractor's project performance on each of the following elements. Provide a brief narrative to support any rating above or below 3.

Performance Element	Performance Rating (1-5)	Comments
1. Quality and timeliness of service		
2. Ability to meet performance goals		
3. Ability to manage content and keep data current		
4. Accuracy, completeness, and timeliness of reports		
5. Competency of personnel employed		
6. Effectiveness of recruitment and employee retention program		
7. Effectiveness of training program		
8. Ability to respond quickly in crisis or high priority situations		



GSA

Past Performance Questionnaire (page 3 of 4)

Performance Element	Performance Rating (1-5)	Comments
9. Ability to respond to work volume fluctuations		
10. Speed of trouble and complaint resolution		
11. Effectiveness of quality assurance and quality improvement programs		
12. Knowledge of Federal Information Systems Security Requirements		
13. Flexibility and responsiveness to accommodate changes		
14. Adherence to industry best practices		
16. Effectiveness of management team, including management of subcontractors		
17. Ability to identify and solve problems with minimal oversight		



Past Performance Questionnaire (page 4 of 4)

Performance Element	Performance Rating (1-5)	Comments
18. Ability to display initiative in identifying and providing solutions	Rating (1-3)	
19. Overall customer satisfaction		
Signature:		Date:

Survey Questionnaire Submission Instructions:

Please submit the completed Past Performance Survey Questionnaire to:

General Services Administration
Office of Chief Acquisition Officer
Operational Contracting Staff (VC)
1800 F Street NW, Room G127
Washington DC 20405

Attention: Robert H. Corey
Contracting Officer

Note: Please mark the outside of the transmittal envelop with the following legend in red ink:

Solicitation GSV07PD0003 – Past Performance Survey Questionnaire
Time Sensitive Information: Please Deliver As Soon As Possible

GSA

Attachment 2: Small Business Subcontracting Plan Outline (Model)

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4644 <u>PLEASE NOTE</u>: This model is provided as a tool. It does not establish minimum requirements for an acceptable plan. The model reflects objectives GSA encourages contractors to adopt. GSA expects offerors to thoroughly review the requirements set forth in FAR 19.704, Subcontracting plan requirements, and FAR clause 52.219-9, Small Business Subcontracting Plan, before submitting their contracting plans.

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The model is not intended to replace any existing corporate plan which is more extensive. If you need assistance to locate small business sources, contact the General Services Administration's Office of Small Business Utilization on (202) 501-1021.

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Identification Data:

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4655	Company Name:		
4656	Address:		
4657	Type of Plan:		
4658	Date Prepared:	Solicitation Number:	
4659	Item/Service:		
4660	Period of Plan:		

4660 4661

TYPE OF PLAN: (Check only one)

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_____INDIVIDUAL PLAN: In this type of plan, all elements are developed specifically for this contract and apply for the full term of this contract

MASTER PLAN: In this type of plan, goals are separately developed for this contract in an individual plan; all other elements are standard. The master plan must be approved once every three years. Once incorporated into a contract with specific goals, it is valid for the life of the contract.

COMMERCIAL PLAN: This type of plan is used when the contractor sells large quantities of off-the-shelf commodities to many Government agencies. Plans and goals are negotiated with the initial agency on a company-wide basis rather than for individual contracts. The plan is effective only during year approved. The contractor must provide a copy of the initial agency approval, and must submit an annual SF 295 to GSA with a breakout of subcontracting prorated for GSA Contractors must submit a new commercial plan on an annual basis. The subcontracting plan must be submitted at least 30 days prior to the expiration date of the currently in effect subcontracting plan.

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I. GOALS ((percentage and dollars)

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State separate dollar and percentage goals for small business, HUBZone small, small disadvantaged business, women-owned small, veteran-owned-small, and service-disabled veteran-owned small business in the following format. For individual plans, goals for each option must be provided. Express all dollar goals as a percentage of total planned subcontracting dollars.

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a. Estimated dollar value of all planned subcontracting, i.e., to all types of business concerns under this contract is:

		Estimated	Dollar V	alue of All	Planned	Subcontra	cting		
Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)	Extended 2 (One Year)	Extended 3 (One Year)	Extended 4 (One Year)	Extended 5 (One Year)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
100 percent	100 percent	100 percent	100 percent	100 percent	100 percent	100 percent	100 percent	100 percent	100 percent

b. Estimated dollar value and percentage of total planned subcontracting to large business concerns (all business concerns classified as other than small):

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		Subo	contractin	g to Large	Business	Concerns			
Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)	Extended 2 (One Year)	Extended 3 (One Year)	Extended 4 (One Year)	Extended 5 (One Year)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
percent	percent	percent	percent	percent	percent	percent	percent	percent	percent

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c. Estimated dollar value and percentage of total planned subcontracting to small business concerns is: (Include HUBZone Small, Small Disadvantaged, Women-owned Small, Veteran-Owned Small, and Service-Disabled Veteran-Owned Small Business)

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		Sub	contractin	g to Small	Business	Concerns			
Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)	Extended 2 (One Year)		Extended 4 (One Year)	Extended 5 (One Year)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
percent	percent	percent	percent	percent	percent	percent	percent	percent	percent

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d. Estimated dollar value and percentage of total planned subcontracting to HUBZone small business concerns is:

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		Subcontro	ecting to H	IUBZone ,	Small Bus	iness Con	cerns		
Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)			Extended 4 (One Year)	
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
percent	percent	percent	percent	percent	percent	percent	percent	percent	percent

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e. Estimated dollar value and percentage of total planned subcontracting to small disadvantaged business concerns is:

		Subcon	tracting to	Small-Di	isadvantag	ed Concer	rns		
Base Period (Two Years)	Option 1 (Two Years)	Option 1 Option 2 Option 3 Option 4 Extended 1 Extended 2 Extended 3 Extended 4 Extended 5 (One Years) (Two Years) (Two Years) (One Year) (One Year) (One Year) (One Year)							
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
percent	percent	percent	percent	percent	percent	percent	percent	percent	percent

f. Estimated dollar value and percentage of total planned subcontracting to women-owned small business concerns is:

	Su	bcontract	ing to Wor	men-Owne	ed Small B	Business C	oncerns		
Base Period (Two Years)	Option 1 (Two Years)	Option 1 Option 2 Option 3 Option 4 Extended 1 Extended 2 Extended 3 Extended 4 Extended 5 (One Year) (One Year) (One Year) (One Year)							
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
percent	percent	percent	percent	percent	percent	percent	percent	percent	percent

g. Estimated dollar value and percentage of total planned subcontracting to veteran-owned small business concerns is:

	Su	bcontracti	ing to Vete	eran-Own	ed Small B	Business C	oncerns		
Base Period (Two Years)	Option 1 (Two Years)	tion 1 Option 2 Option 3 Option 4 Extended 1 Extended 2 Extended 3 Extended 4 Extended 5 (One Year) (One Year) (One Year) (One Year)							
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
percent	percent	percent	percent	percent	percent	percent	percent	percent	percent

h. Estimated dollar value and percentage of total planned subcontracting service-disabled veteran-owned small business concerns is:

Si	ubcontrac	ting to Ser	vice-Disal	bled, Veter	ran-Owned	d Small Bi	usiness Co	oncerns	
Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)			Extended 4 (One Year)	
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
percent	percent	percent	percent	percent	percent	percent	percent	percent	percent

II PRODUCTS AND/OR SERVICES TO BE SUBCONTRACTED UNDER THIS CONTRACT, AND THE TYPES OF BUSINESSES SUPPLYING THEM, ARE: (Check all that apply).

	Business Category or Size								
Product Service	NAICS	Large	Small	HUB Small	SDB	WOSB	VOSB	SDVOSB	
			_		_	_			

(Attach additional sheets if necessary.)

III DES	DESCRIPTION OF METHOD USED TO DEVELOP THE SUBCONTRACTING GOALS AND SCRIPTION OF THE METHOD USED TO IDENTIFY POTENTIAL SOURCES
disa	Explain the methods used to develop the subcontracting goals for small, HUBZone small, small dvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small iness concerns.
sub	Explain how the product and service areas to be subcontracted were established, how the areas to be contracted to small, HUBZone small, small disadvantaged, women-owned small small-veteran-owned ill, and service-disabled veteran-owned small business concerns were determined.
	How the capabilities of small, HUBZone small, small disadvantaged, women-owned small, veteraned small, and service-disabled, veteran-owned small business concerns were determined.
d.	Identify all source lists used in the determination process.
a. pero	Indirect and overhead costsHAVE BEEN orHAVE NOT BEEN included in the dollar and centage subcontracting goals stated above. (Check one.) If indirect and overhead costs HAVE BEEN included, explain the method used to determine the portionate share of such costs to be allocated as subcontracts to small, HUBZone small, small indvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small iness concerns.
FAI	PROGRAM ADMINISTRATOR R 52.219-9(d)(7) requires information about the company employee who will administer the contracting program. Please provide the name, title, address, phone number, position within the

4745	Name:	
	Title:	
	Address:	
	Telephone:	
	E-mail	Address
4750		
4751	Facsimile Number:	

Duties: The Program Administrator's general overall responsibility for the Contractor's subcontracting program, i.e., developing, preparing, and executing individual subcontracting plans and monitoring performance relative to this particular plan. These duties may include, but are not limited to the following activities.

a. Developing and promoting company/division policy statements that demonstrate the company's/division's support for awarding contracts and subcontracts to small, HUBZone small, small disadvantaged, and women-owned small business concerns.

b. Developing and maintaining bidders' lists of small, HUBZone small, small disadvantaged, womenowned small, veteran-owned small, and service-disabled veteran-owned small business concerns from all possible sources.

c. Ensuring periodic rotation of potential subcontractors on bidders' lists.

d. Assuring that small, HUBZone small, small disadvantaged, women-owned small, veteran-owned-small, and service-disabled veteran-owned small business concerns are included on the bidders' list for every subcontract solicitation for products and services they are capable of providing.

e. Ensuring that subcontract procurement "packages" are designed to permit the maximum possible participation of small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small business concerns.

f. Reviewing subcontract solicitations to remove statements, clauses, etc., which might tend to restrict or prohibit small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small business participation.

g. Ensuring that the subcontract bid proposal review board documents its reasons for not selecting any low bids submitted by small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small business concerns.

4784 h. Overseeing the establishment and maintenance of contract and subcontract award records.

i. Attending or arranging for the attendance of company counselors at Business Opportunity Workshops, Minority Business Enterprise Seminars, Trade Fairs, etc.

j. Directly or indirectly counseling small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small business concerns on subcontracting opportunities and how to prepare bids to the company

4793 4794 4795 4796 4797	k. Providing notice to subcontractors concerning penalties for misrepresentations of business status as small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, or service-disabled veteran-owned small business for the purpose of obtaining a subcontract that is to be included as part or all of a goal contained in the contractor's subcontracting plan.
4798 4799 4800	1. Conducting or arranging training for purchasing personnel regarding the intent and impact of Public Law 95-907 on purchasing procedures.
4801 4802 4803	m. Developing and maintaining an incentive program for buyers which support the subcontracting program.
4804 4805 4806	n. Monitoring the company's performance and making any adjustments necessary to achieve the subcontract plan goals.
4807 4808	o. Preparing and submitting timely reports.
4809 4810 4811	p. Coordinating the company's activities during compliance reviews by Federal agencies.
4812 4813	VI EQUITABLE OPPORTUNITY
4814 4815 4816 4817 4818 4819 4820 4821	FAR 52.219-9(d)(8) requires a description of the efforts your company will make to ensure that small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small business concerns will have an equitable opportunity to compete for subcontracts. These efforts may include, but are not limited to the following activities: a. Outreach efforts to obtain sources: Contacting minority and small business trade associations Contacting business development organizations Requesting sources from the CCR website at http://www.ccr.gov/ "Dynamic Small Business Search" Attending small, minority, and women-owned business procurement conferences and trade fairs b. Internal efforts to guide and encourage purchasing personnel: Presenting workshops, seminars and training programs Establishing, maintaining and using small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small business source lists, guides and other data for soliciting subcontracts Monitoring activities to evaluate compliance with the subcontracting plan
4822	A 14'' and 16'Control (Discontinuo)
4823	c. Additional efforts: (Please describe.)

VII CLAUSE INCLUSION AND FLOWDOWN

FAR 52.219-9(d)(9) requires that your company provide assurances that it will include the clause at FAR 52.219-8, "Utilization of Small Business Concerns," in all subcontracts that offer further subcontracting opportunities.

FAR 52.219-9(d)(9) also requires that your company agrees in this plan that it will require all subcontractors, except small business concerns, that receive subcontracts in excess of \$500,000 (\$1,000,000 for construction) to adopt a plan complies with the requirements of FAR 52.219-9, "Small Business Subcontracting Plan."

[Insert company name] agrees that the clause will be included and that the plans will be reviewed against the minimum requirements for such plans. The acceptability of percentage goals for small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small business concerns must be determined on a case-by-case basis depending on the supplies and services involved, the availability of potential small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small business subcontractors and prior experience. Once the plans are negotiated, approved, and implemented, the plans must be monitored through the submission of periodic reports, including Standard Form (SF) 294 and SF 295 reports.

In accordance with policy letters published by the Office of Federal Procurement Policy, such assurance must describe the offer's procedures for the review, approval and monitoring for compliance with such subcontracting plans.

VIII REPORTING AND COOPERATION

FAR 52.219-9(d)(10) requires that your company (1) cooperate in any studies or surveys as may be required, (2) submit periodic reports which show compliance with the subcontracting plan; (3) submit Standard Form (SF) 294, "Subcontracting Reports for Individual Contracts," and SF 295,

"Summary Subcontract Report," in accordance with the instructions on the forms; and (4) ensure that subcontractors agree to submit SF 294 and SF 295.

Both the Associate Administrator for the Office of Small Business Utilization and the Small Business Technical Advisor must receive the report(s) within 30 days after the close of each calendar period. That is:

Calendar Period	Report Due	Date Due	Send Report To
10/01-03/31	SF 294	04/30	Contracting Officer/Small Business Technical Advisor
04/01-09/30	SF 294	10/30	Contracting Officer/Small Business Technical Advisor
10/01–09/30	SF 295*	10/30	Contracting Officer/Associate Administrator for Office of Small Business Utilization

SF 295 Must be submitted to SBA's Commercial Market Representative

Small Business Technical Advisor address is:	Associate Administrator for Office of Small Business Utilization
(To be completed by Contracting Officer)	address is: (To be completed by Contracting Officer)

4865 IX RECORDKEEPING

FAR 52.219-9(d)(11) requires a list of the types of records your company will maintain to demonstrate the procedures adopted to comply with the requirements and goals in the subcontracting plan. These records include, but are not limited to, the following:

- a. Small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small business concern source lists, guides, and other data identifying such vendors.
 - b. Organizations contacted for small, HUBZone small, small disadvantaged, women-owned small, veteran-owned-small, and service-disabled veteran-owned small business sources
 - c. On a contract-by-contract basis, records on all subcontract solicitations over \$100,000 which indicate for each solicitation:
 - o Whether small business concerns were solicited, and if not, why not.
 - o Whether HUBZone small business concerns were solicited, and if not, why not.
 - o Whether small disadvantaged business concerns were solicited, and if not, why not.
 - o Whether women-owned small business concerns were solicited, and if not, why not.
 - Whether veteran-owned small business concerns were solicited, and if not, why not.
 - Whether service-disabled veteran-owned small business concerns were solicited, and if not, why not.
 - o Reasons for the failure of solicited small, small disadvantaged, women-owned small business, veteran-owned small business, service-disabled veteran-owned small business, and HUBZone small business concerns to receive the subcontract award.
 - d. Records to support other outreach efforts, e.g., contacts with minority and small business trade associations, attendance at small, HUBZone small, minority, women-owned small, veteran-owned small, and service-disabled veteran-owned small business procurement conferences and trade fairs.
 - e. Records to support internal activities to (1) guide and encourage purchasing personnel, e.g., workshops, seminars, training programs, incentive awards; and (2) monitor activities to evaluate compliance.
 - f. On a contract-by-contract basis, records to support subcontract award data including the name, address and business size of each subcontractor. (This item is not required for company or division-wide commercial plans).
 - g. Other records to support your compliance with the subcontracting plan: (Please describe)

06 X 07	NTRACTORS	
08 FAR 3 09 amour 10 disady	nts due pursuant to the terms o	o establish and use procedures to ensure the timely payment of f your subcontracts with small, HUBZone small, small gran-owned small, and service-disabled veteran-owned small
	sert company name] has established a	nd uses such procedures:
14		
15		
6 XI 7	DESCRIPTION OF GOOD FAITH	EFFORT
8 Maxir		HUBZone small, small disadvantaged, women-owned small, veteran-owned small business concerns as subcontractors in
	· ·	onal interest with both social and economic benefits. When a
contra	actor fails to make a good faith effort	to comply with a subcontracting plan, these objectives are not
		ts that the contractor must pay liquidated damages. In order to
		d faith effort to achieve the small, HUBZone small, small gran-owned small, and service-disabled veteran-owned small
busine	ess subcontracting goals, outline th	e steps your company plans to take. These steps will be
negoti	iated with the contracting officer prior	r to approval of the plan.
The o		
	offeror is advised that submission o ard Form 295 will be made a materia	of the subcontracting plan and Standard Form 294 and/or
Siana	ara Form 295 wiii be maae a maieria	i pari of the contract.
XII	SIGNATURES REQUIRED	
This s	subcontracting plan was submitted by:	This subcontracting plan was accepted by:
Signa	ture:	Signature:
Typed	<u>d Name</u> :	Typed Name:
<u>Title</u> :		<u>Title</u> : Contracting Officer
Date:		<u>Date</u> :

Attachment 3: Technical Proposal Index

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Offerors are required to submit, as part of their Technical Proposal, an Index referencing the page and paragraph numbers that contain their response/methodology/narrative, on an item by item basis to all requirements of this solicitation. Offerors shall complete Attachment 3 provided below by inserting a reference in the "Contractor Proposal Reference" column which indicates the section or page reference number from the offeror's proposal that describes its solution or approach for meeting the stated requirement. Offerors shall include a completed copy of Attachment 3 as part of their proposal submission package.

Attachment 3. Technical Proposal Index

Attachment 3: Technical Proposal Index				
RFP				
Reference	Requirement	Contractor Proposal Reference		
L.7.2.1.2	Executive Summary			
L.7.2.1.3	Experience			
L.7.2.1.3.1	Minimum Required Experience			
L.7.2.1.3.2	Documentation of Experience			
L.7.2.1.4	Past Performance			
L.7.2.1.5	Technical Approach			
L.7.2.1.5.1	Services to be Provided			
C.3.1	Automated Services			
C.3.1.1	Automated Voice Response Services			
C.3.1.2	Facsimile Services			
C.3.1.3	Voice Mail Service			
C.3.1.4	Automated Callback (Telephone)			
C.3.1.5	Web Callback			
C.3.1.6	Automated Outbound Dialing Campaign			
C.3.1.7	Automated Facsimile Delivery			
C.3.1.8	Automated E-mail Delivery			
C.3.1.9	Hosted On-Line Ordering			
C.3.1.10	Hosted E-Mail Web Form			
C.3.1.11	Hosted FAQ Service			
C.3.2	Attended Services			
C.3.2.1	Responding to Telephone Inquiries			
C.3.2.2	Outbound Calling Services			
C.3.2.3	Responding to Postal Mail Inquiries			
C.3.2.4	Responding to E-Mail Inquiries			
C.3.2.5	Responding to Facsimile Inquiries			
C.3.2.6	Interactive Web Services			
C.3.3	Other Support Services			
C.3.3.1	Fulfillment Services			
C.3.3.2	Transcription Service			
C.3.3.3	Language Translation Service			
C.3.4	Directory Listing Services			
C.3.5	Technical and Management Services			
C.3.5.1	Core Project Management Support			
C.3.5.2	Site Management			
C.3.5.3	Program Management			
C.3.5.4	Technology Management			

Attachment 3: Technical Proposal Index

	s: Tecnnicai Proposai Inaex	
RFP	n	
Reference	Requirement	Contractor Proposal Reference
L.7.2.1.7	Security Plan	
C.3.5.5	Information Systems Security	
C.3.5.5.1	Personnel Security	
C.3.5.5.2	Information and Telecommunications Systems	
	Security	
C.3.5.5.3	Facility Security	
L.7.2.1.5.3	Contingency/Disaster Recovery Planning	
C.3.5.5.4	Contingency/Disaster Recovery	
C.3.5.6	Content and Knowledge Management	
C.3.5.7	Contact/Case Management	
C.3.5.8	Relationship Management	
C.3.5.9	Customer Satisfaction Assessments	
C.3.6	Special Project Support	
C.4	Staff to be Provided	
C.4.1	Key Personnel	
C.4.2	Support Staff	
C.4.3	Information Specialist	
L.7.2.1.5.2	Facilities and Technology Infrastructure	
C.5	Facilities to be Provided	
C.5.1	General Requirements	
C.5.2	Facility Infrastructure	
C.5.3	Site Selection and Facility Design Requirements	
C.5.4	Project Housing	
C.5.4.1	Exclusive-Use Space	
C.5.5	Facility and Systems Access	
C.6	Technology Infrastructure to be Provided	
C.6.1	Call Processing Technology and Services	
C.6.2	E-Mail Routing and Management	
C.6.3	FAQ System	
C.6.4	Knowledge Management	
C.6.5	Contact Management	
C.6.6	Workforce Management	
C.6.7	Customer Survey Automation	
C.6.8	Compliment and Complaint Management	
C.6.9	Service Monitoring and Quality Control	
C.6.10	Training	
C.6.11	Literature Fulfillment	
C.6.12	Voice Mail and Electronic Mail	
C.6.13	Online Ordering System	
C.6.14	Web Chat System	
C.6.15	Power Supply	
C.6.16	Database Design	
C.0.10	Telecommunications Services to be Provided	
C.7.1	Local Telecommunications Services and Internet	
C.7.1	Access	
C.7.2	Intercity Telecommunications Services	

Attachment 3: Technical Proposal Index

RFP	•	
Reference	Requirement	Contractor Proposal Reference
C.7.3	Network Design	
C.7.4	Network Termination Equipment	
C.7.5	Service Coordination	
C.7.6	Telephone Number Ownership	
C.7.7	Internet Domain Ownership	
L.7.2.1.5.4	Emergency Response Capability	
L.7.2.1.6	Management Plan	
L.7.2.1.6.1	Program Management Plan	
L.7.2.1.6.2	Human Resources Management Plan	
C.8	Human Resources Management	
C.8.1	Recruitment and Retention	
C.8.2	Training	
L.7.2.1.6.5	Quality Assurance/Quality Improvement Plan	
C.9	Quality Assurance/Quality Improvement	
C.9.1	Service Monitoring and Calibration	
C.9.2	Effectiveness of Service Delivery	
C.9.3	Quality Improvement Program	
L.7.2.1.6.4	Performance Management Plan	
C.10	Performance Management	
C.11	Management Reports	
C.11.1	Weekly and Monthly Status Reports	
C.11.2	Operational Reports	
C.11.3	Problem Resolutions Reports	
C.11.4	Monitoring Reports	
C.11.5	Compliment and Complaint Management Reports	
C.11.6	Ad Hoc Reports	
L.7.2.1.8	Plan for Special Hiring	

4947	PART IV – REPRESENTATIONS AND INSTRUCTIONS				
4948 4949					
4950	<u>SECTION K –</u>				
4951	REPRES	ENTATIONS CERTIFICATIONS AND OTHER STATEMENT	S OF OFFERORS		
4952					
4953 4954	V 1 50.05	2.2 CLATICEC INCORDODATED BY DEFEDENCE (EED 1000)			
		2-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)	1 66		
4955 4956 4957 4958 4959	were given in	incorporates the following clauses by reference, with the same form full text. Upon request, the Contracting Officer will make a copy of full text of a clause may be accessed electronically at rnet.gov/far.	f the full text available.		
4960 4961		Federal Acquisition Regulation (48 CFR, APR 1984) Claus	ses		
4961	Clause No.	Clause Title	Date		
4963 4964 4965 4966	52.203-11	Certification and Disclosure Regarding Payments to Influence Certain Federal Transactions	SEP 2005		
4966	K.2 52.20	3-02 CERTIFICATE OF INDEPENDENT PRICE DETERMINATION	(Apr 1985)		
4968 4969 4970 4971 4972	(1) T	or certifies that- The prices in this offer have been arrived at independently, without the prices in this offer have been arrived at independently, without the prices in this offer have been arrived at independently, without the prices in this offer have been arrived at independently, without the prices in this offer have been arrived at independently, without the prices in this offer have been arrived at independently, without the prices in this offer have been arrived at independently, without the prices in this offer have been arrived at independently, without the prices in this offer have been arrived at independently, without the prices in this offer have been arrived at independently, without the prices in this offer have been arrived at independently, without the prices in this offer have been arrived at independently, without the prices in the price			
4973	(i	i) Those prices;			
4974	(i	ii) The intention to submit an offer; or			
4975 4976	(i	iii) The methods or factors used to calculate the prices offered.			
4977 4978 4979 4980	directly or in solicitation) of	The prices in this offer have not been and will not be knowingly didirectly, to any other offeror or competitor before bid opening (in the contract award (in the case of a negotiated solicitation) unless quired by law; and			
4981 4982 4983		To attempt has been made or will be made by the offeror to induc to submit an offer for the purpose of restricting competition.	e any other concern to		
4984 4985	(b) Each sign	ature on the offer is considered to be a certification by the signatory the	hat the signatory-		
4986 4987 4988 4989	in this bid or	the person in the offeror's organization responsible for determining a proposal, and that the signatory has not participated and will not paragraphs (a)(1) through (a)(3) of this provision; or			
4990 4991 4992	that those pri	i) Has been authorized, in writing, to act as agent for the following neipals have not participated, and will not participate in any action h (a)(3) of this provision [insert full nature]			

	Amendment-A002
4993 4994 4995	offeror's organization responsible for determining the prices offered in this bid or proposal, and the title of his or her position in the offeror's organization];
4996 4997 4998 4999 5000 5001	(ii) As an authorized agent, does certify that the principals named in subdivision $(b)(2)(i)$ of this provision have not participated, and will not participate, in any action contrary to paragraphs $(a)(1)$ through $(a)(3)$ of this provision; and (iii) As an agent, has not personally participated, and will not participate, in any action contrary to paragraphs $(a)(1)$ through $(a)(3)$ of this provision.
5002 5003 5004 5005	(c) If the offeror deletes or modifies paragraph (a)(2) of this provision, the offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure.
5006	K.3 52.204-03 TAXPAYER IDENTIFICATION (OCT 1998)
5007 5008 5009 5010	(a) Definitions. "Common parent," as used in this provision, means that corporate entity that owns or controls an affiliated group of corporations that files its Federal income tax returns on a consolidated basis, and of which the offeror is a member.
5011 5012 5013 5014	"Taxpayer Identification Number (TIN)," as used in this provision, means the number required by the Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The TIN may be either a Social Security Number or an Employer Identification Number.
5015 5016 5017 5018 5019 5020 5021	(b) All offerors must submit the information required in paragraphs (d) through (f) of this provision to comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the IRS. If the resulting contract is subject to the payment reporting requirements described in Federal Acquisition Regulation (FAR) 4.904, the failure or refusal by the offeror to furnish the information may result in a 31 percent reduction of payments otherwise due under the contract.
5022 5023 5024 5025 5026	(c) The TIN may be used by the Government to collect and report on any delinquent amounts arising out of the offeror's relationship with the Government (31 U.S.C. 7701(c)(3)). If the resulting contract is subject to the payment reporting requirements described in FAR 4.904, the TIN provided hereunder may be matched with IRS records to verify the accuracy of the offeror's TIN.
5027 5028 5029 5030 5031 5032 5033 5034 5035 5036	(d) Taxpayer Identification Number (TIN). [] TIN: [] TIN has been applied for. [] TIN is not required because: [] Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States; [] Offeror is an agency or instrumentality of a foreign Government; [] Offeror is an agency or instrumentality of the Federal Government.
5037 5038 5039 5040 5041 5042	 (e) Type of organization. [] Sole proprietorship; [] Partnership; [] Corporate entity (not tax-exempt); [] Corporate entity (tax-exempt); [] Government entity (Federal, State, or local);

5043	[] Foreign Government;
5044	[] International organization per 26 CFR 1.6049-4;
5045	[] Other
5046	
5047	(f) Common parent.
5048	[] Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this
5049	provision.
5050	[] Name and TIN of common parent:
5051	
5052	Name
5052	TIN
5055	
5055	K.4 52.204-05 WOMEN-OWNED BUSINESS (OTHER THAN SMALL BUSINESS) (MAY 1999)
5056 5057 5058 5059 5060	(a) Definition. "Women-owned business concern," as used in this provision, means a concern that is at least 51 percent owned by one or more women; or in the case of any publicly owned business, at least 51 percent of its stock is owned by one or more women; and whose management and daily business operations are controlled by one or more women.
5061	(b) Representation. [Complete only if the offeror is a women-owned business concern and has not
5062	represented itself as a small business concern in paragraph (b)(1) of FAR 52.219-1, Small Business
5062	Program Representations, of this solicitation.] The offeror represents that it [] is [] is not a women-
	owned business concern.
5064 5065	owned business concern.
5066	V. 5 - 53 300 05 CERTIFICATION DECARDING DEPAREMENT CUCRENCION DRODGER
5067 5068	K.5 52.209-05 CERTIFICATION REGARDING DEBARRMENT, SUSPENSION, PROPOSED
	DEBARMENT, AND OTHER RESPONSIBILITY MATTERS (DEC 2001)
5069	(a)(1) The Offeror certifies, to the best of its knowledge and belief, that-
5070	(1) TTI O.CC 1/ C1 D.1 1 1
5071	(i) The Offeror and/or any of its Principals-
5072	(A) Are [] are not [] presently debarred, suspended, proposed for debarment, or declare
5073	ineligible for the award of contracts by any Federal agency;
5074	mongroup for the arrange of any reason agency,
5075	(B) Have [] have not [], within a three-year period preceding this offer, been convicted
5076	of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in
5077	connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract
5078	
	or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or
5079	commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false
5080	statements, tax evasion, or receiving stolen property; and
5081	(C) Are [] are not [] presently indicted for, or otherwise criminally or civilly charged
5082	by a Governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of
5083	this provision.
5084	
5085	(ii) The Offeror has [] has not [], within a three-year period preceding this offer, had one or
5086	more contracts terminated for default by any Federal agency.
5087	
5088	(2) "Principals," for the purposes of this certification, means officers; directors; owners; partners;
5089	and, persons having primary management or supervisory responsibilities within a business entity (e.g.,
5090	general manager; plant manager; head of a subsidiary, division, or business segment, and similar
5091	
5091 5092	positions).

- 5093 This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the 5094 Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution 5095 Under Section 1001, Title 18, United States Code. 5096 5097 (b) The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to 5098 contract award, the Offeror learns that its certification was erroneous when submitted or has become 5099 erroneous by reason of changed circumstances. 5100 5101 (c) A certification that any of the items in paragraph (a) of this provision exists will not necessarily result 5102 in withholding of an award under this solicitation. However, the certification will be considered in 5103 connection with a determination of the Offeror's responsibility. Failure of 5104 the Offeror to furnish a certification or provide such additional information as requested by the 5105 Contracting Officer may render the Offeror non-responsible. 5106 5107 (d) Nothing contained in the foregoing shall be construed to require establishment of a system of records 5108 in order to render, in good faith, the certification required by paragraph (a) of this provision. The 5109 knowledge and information of an Offeror is not required to exceed that which is 5110 normally possessed by a prudent person in the ordinary course of business dealings. 5111 5112 (e) The certification in paragraph (a) of this provision is a material representation of fact upon which 5113 reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an 5114 erroneous certification, in addition to other remedies available to the Government, the Contracting Officer 5115 may terminate the contract resulting from this solicitation for default. 5116 5117 52.214-16 MINIMUM BID ACCEPTANCE PERIOD (APR 1984) **K.6** 5118 (a) "Acceptance period," as used in this provision, means the number of calendar days available to the Government for awarding a contract from the date specified in this solicitation for receipt of bids. 5119 5120 5121 (b) This provision supersedes any language pertaining to the acceptance period that may appear elsewhere 5122 in this solicitation. 5123 5124 (c) The Government requires a minimum acceptance period of 120 270 calendar days 5125 5126 (d) In the space provided immediately below, bidders may specify a longer acceptance period than the Government's minimum requirement. The bidder allows the following acceptance period: 5127 5128 _____ calendar days. 5129 5130 (e) A bid allowing less than the Government's minimum acceptance period will be rejected. 5131 5132 (f) The bidder agrees to execute all that it has undertaken to do, in compliance with its bid, if that 5133 bid is accepted in writing within-5134 5135 (1) The acceptance period stated in paragraph (c) of this clause; or 5136 5137 (2) Any longer acceptance period stated in paragraph (d) of this clause.
 - **K.7 52.215-06 PLACE OF PERFORMANCE (OCT 1997)**

5138 5139

5140 5141

5142

(a) The offeror or respondent, in the performance of any contract resulting from this solicitation, [] intends, [] does not intend [check applicable block] to use one or more plants or facilities located at a

different address from the address of the offeror or respondent as indicated in this proposal or response to request for information.

(b) If the offeror or respondent checks "intends" in paragraph (a) of this provision, it shall insert in the following spaces the required information:

Place of Performance (Street Address, City, State, County, Zip Code)	Name and Address of Owner and Operator of the Plant or Facility if Other than Offeror or Respondent

K.8 52.219-22 SMALL DISADVANTAGED BUSINESS STATUS (OCT 1999)

(a) General. This provision is used to assess an offeror's small disadvantaged business status for the purpose of obtaining a benefit on this solicitation. Status as a small business and status as a small disadvantaged business for general statistical purposes is covered by the provision at FAR 52.219-1, Small Business Program Representation.

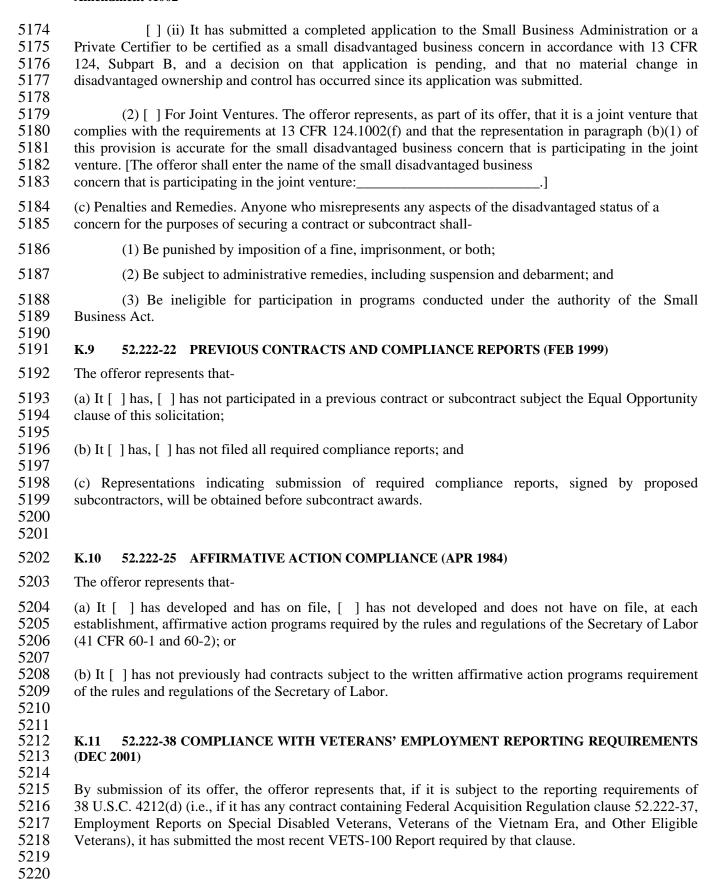
- 5157 (b) Representations.
- 5158 (1) General. The offeror represents, as part of its offer, that it is a small business under the size standard applicable to this acquisition; and either-

[] (i) It has received certification by the Small Business Administration as a small disadvantaged business concern consistent with 13 CFR 124, Subpart B; and

(A) No material change in disadvantaged ownership and control has occurred since its certification;

(B) Where the concern is owned by one or more disadvantaged individuals, the net worth of each individual upon whom the certification is based does not exceed \$750,000 after taking into account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and

(C) It is identified, on the date of its representation, as a certified small disadvantaged business concern in the database maintained by the Small Business Administration (PRO-Net); or



5221 K.12 52,223-13 CERTIFICATION OF TOXIC CHEMICAL RELEASE REPORTING (AUG 2003)

- 5222 (a) Executive Order 13148, of April 21, 2000, Greening the Government through Leadership in Environmental Management, requires submission of this certification as a prerequisite for contract award. 5224
- 5225 (b) By signing this offer, the offeror certifies that-

- (1) As the owner or operator of facilities that will be used in the performance of this contract that are subject to the filing and reporting requirements described in section 313 of the Emergency Planning and Community Right-to-Know Act of 1986 (EPCRA) (42 U.S.C. 11023) and section 6607 of the Pollution Prevention Act of 1990 (PPA) (42 U.S.C. 13106), the offeror will file and continue to file for such facilities for the life of the contract the Toxic Chemical Release Inventory Form (Form R) as described in sections 313(a) and (g) of EPCRA and section 6607 of PPA; or
- (2) None of its owned or operated facilities to be used in the performance of this contract is subject to the Form R filing and reporting requirements because each such facility is exempt for at least one of the following reasons: [Check each block that is applicable.]
- [] (i) The facility does not manufacture, process, or otherwise use any toxic chemicals listed in 40 CFR 372.65;
- [] (ii) The facility does not have 10 or more full-time employees as specified in section 313(b)(1)(A) of EPCRA, 42 U.S.C. 11023(b)(1)(A);
- [] (iii) The facility does not meet the reporting thresholds of toxic chemicals established under section 313(f) of EPCRA, 42 U.S.C. 11023(f) (including the alternate thresholds at 40 CFR 372.27, provided an appropriate certification form has been filed with EPA);
- [] (iv) The facility does not fall within the following Standard Industrial Classification (SIC) codes or their corresponding North American Industry Classification System sectors:
 - (A) Major group code 10 (except 1011, 1081, and 1094.
 - (B) Major group code 12 (except 1241).
 - (C) Major group codes 20 through 39.
- (D) Industry code 4911, 4931, or 4939 (limited to facilities that combust coal and/or oil for the purpose of generating power for distribution in commerce)
- (E) Industry code 4953 (limited to facilities regulated under the Resource Conservation and Recovery Act, Subtitle C (42 U.S.C. 6921, et seq.), or 5169, or 5171, or 7389 (limited to facilities primarily engaged in solvent recovery services on a contract or fee basis); or
 - (v) The facility is not located in the United States or its outlying areas..

K.13 52.227-15 REPRESENTATION OF LIMITED RIGHTS DATA AND RESTRICTED COMPUTER SOFTWARE (MAY 1999)

(a) This solicitation sets forth the work to be performed if a contract award results, and the Government's known delivery requirements for data (as defined in FAR 27.401). Any resulting contract may also provide the Government the option to order additional data under the Additional Data Requirements clause at 52.227-16 of the FAR, if included in the contract. Any data delivered under the resulting contract will be subject to the Rights in Data-General clause at 52.227-14 that is to be included in this

contract. Under the latter clause, a Contractor may withhold from delivery data that qualify as limited rights data or restricted computer software, and deliver form, fit, and function data in lieu thereof. The latter clause also may be used with its Alternates II and/or III to obtain delivery of limited rights data or restricted computer software, marked with limited rights or restricted rights notices, as appropriate. In addition, use of Alternate V with this latter clause provides the Government the right to inspect such data at the Contractor's facility.

- (b) As an aid in determining the Government's need to include Alternate II or Alternate III in the clause at 52.227-14, Rights in Data-General, the offeror shall complete paragraph (c) of this provision to either state that none of the data qualify as limited rights data or restricted computer software, or identify, to the extent feasible, which of the data qualifies as limited rights data or restricted computer software. Any identification of limited rights data or restricted computer software in the offeror's response is not determinative of the status of such data should a contract
- 5282 be awarded to the offeror.
- 5283 (c) The offeror has reviewed the requirements for the delivery of data or software and state [offeror check appropriate block]-

[] No	one of the data	proposed for	fulfilling	such	requirements	qualifies	as	limited	rights	data	or
restricted comp	outer software.										

	Data proposed for fulfilling such requirements r software and are identified as follows:	qualify	as lin	nited	rights	data	or	restricted
-								

Note: "Limited rights data" and "Restricted computer software" are defined in the contract clause entitled "Rights in Data-General.

K.14-552.252-05 AUTHORIZED DEVIATIONS IN PROVISIONS (DEVIATION FAR 52.252-5) (SEP 1999) (GSAM Clause)

(a) Deviations to FAR provisions.

 (1) This solicitation indicates any authorized deviation to a Federal Acquisition Regulation (48 CFR Chapter 1) provision by the addition of "(DEVIATION)" after the date of the provision, if the provision is not published in the General Services Administration Acquisition Regulation (48 CFR Chapter 5).

(2) This solicitation indicates any authorized deviation to a Federal Acquisition Regulation (FAR) provision that is published in the General Services Administration Acquisition Regulation by the addition of "(DEVIATION (FAR provision no.))" after the date of the provision.

(b) Deviations to GSAR provisions. This solicitation indicates any authorized deviation to a General Services Administration Acquisition Regulation provision by the addition of "(DEVIATION)" after the date of the provision.

5315 (c) "Substantially the same as" provisions. Changes in wording of provisions prescribed for use on a "substantially the same as" basis are not considered deviations.

5317 5318		SECTION L	
5319		INSTRUCTIONS, CONDITIONS AND NOTICES TO OFFERO	<u>ORS</u>
5320 5321 5322	L.1 2.252	-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)	
5323 5324 5325 5326 5327 5328	were given in	incorporates the following clauses by reference, with the same force full text. Upon request, the Contracting Officer will make a copy of tall text of a clause may be accessed electronically at the net.gov/far.	he full text available.
5329 5330		L.1.1 Federal Acquisition Regulation (48 CFR, APR 1984) Cla	uses
5331	Clause No.	Clause Title	Date
5332 5333 5334 5335 5336 5337 5338	52.211-01 52.215-01 52.222-24 52.222-46	Availability of Specifications in the GSA Index of Federal Specifications, Standards and Commercial Item Descriptions Instructions to Offerors – Competitive Acquisition (Alt.I [Oct 1997]) Preaward On-Site Equal Opportunity Compliance Review Evaluation of Compensation for Professional Employees	AUG 1998 JAN 2004 JUL 2005 FEB 1993
5339	L.	`	
5340 5341 5342 5343	552.219-72 L.2 ELECT	Preparation, Submission and Negotiation of Subcontracting Plans **RONIC VERSION OF SOLICITATION**	JUN 2005
5344		version of this solicitation is on the FedBizOpps website at www.fedbi	zonne gov. It will be
5345 5346 5347 5348		lity of the Offeror to print copies for its use. No hard copy of the solid	
5349	L.3 52.216-	01 TYPE OF CONTRACT (APR 1984)	
5350 5351 5352 5353		nent anticipates award of one or more indefinite-delivery, indefinite this solicitation for contractor operated and managed multi-channel contractor operated and multi-channe	
5354	L.4 52.216-	27 SINGLE OR MULTIPLE AWARDS (OCT 1995)	
5355 5356 5357 5358 5359	multiple deliv	ent may elect to award a single delivery order contract or task order ery order contracts or task order contracts, for the same or similar suburces under this solicitation.	
5360	L.5 52.233-	2 SERVICE OF PROTEST (SEP 2006)	
5361 5362		defined in section 33.101 of the Federal Acquisition Regulation, that a d copies of any protests that are filed with the Government Accountation	•

5363	shall be served on the Contracting Officer (addressed as follows) by obtaining written and dated
5364	acknowledgment of receipt from Mr. Robert H. Corey or Dr. Carol Barton:
5365	
5366	General Services Administration
5367	Office of Chief Acquisition Officer
5368	Operational Contracting Staff (VC)
5369	1800 F Street NW, Room G127
5370	Washington, DC 20405
5371	
5372	b) The copy of any protest shall be received in the office designated above within one day of filing a
5373	protest with the GAO.
5374	
5375	
5376 5377	L.5 552.233-70 PROTESTS FILED DIRECTLY WITH THE GENERAL SERVICE ADMINISTRATION (MAR 2000)
5378	The following definitions apply in this provision:
5379	
5380	(a) "Agency Protest Official for GSA" means the official in the Office of Acquisition Policy
5381	designated to review and decide procurement protests filed with GSA.
5382	
5383	"Deciding official" means the person chosen by the protester to decide the agency protest. The deciding
5384	official may be either the Contracting Officer or the Agency Protest Official.
5385	
5386	(b) The filing time frames in FAR 33.103(e) apply. An agency protest is filed when the protest
5387	complaint is received at the location the solicitation designates for serving protests. GSA's hours of
5388	operation are 8:00 a.m. to 4:30 p.m. Protests delivered after 4:30 p.m. will be considered received and
5389	filed the following business day.
5390	
5391	(c) A protest filed directly with the General Services Administration (GSA) must:
5392	
5393	(1) Indicate that it is a protest to the agency.
5394	
5395	(2) Be filed with the Contracting Officer
5396	
5397	(3) State whether the protester chooses to have the Contracting Officer or the Agency Protest
5398	Official for GSA decide the protest. If the protest is silent on this matter, the Contracting Officer will
5399	decide the protest.
5400	
5401	(4) Indicate whether the protester prefers to make an oral presentation, a written presentation, or an
5402	oral presentation confirmed in writing, of arguments in support of the protest to the deciding official.
5403	
5404	(5) Include the information required by FAR 33.103(d)(2):
5405	
5406	(i) Name, address, fax number, and telephone number of the protester.
5407	
5408	(ii) Solicitation or contract number.
5409	
5410	(iii) Detailed statement of the legal and factual grounds for the protest, to include a
5411	description of resulting prejudice to the protester.
5412	

(v)

(iv) Copies of relevant documents.

filing a protest.

Request for a ruling by the agency.

(vi) Statement as to the form of relief requested.

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5463

5423	provision).
5424	
5425	(d) An interested party filing a protest with GSA has the choice of requesting either that the
5426	Contracting Officer or the Agency Protest Official for GSA decide the protest.
5427	
5428	(e) The decision by the Agency Protest Official for GSA is an alternative to a decision by the
5429	Contracting Officer. The Agency Protest Official for GSA will not consider appeals from the Contracting
5430	Officer's decision on an agency protest.
5431	
5432	(f) The deciding official must conduct a scheduling conference with the protester within three days
5433	after the protest is filed. The scheduling conference will establish deadlines for oral or written arguments
5434 5435	in support of the agency protest and for agency officials to present information in response to the protest
5436	issues. The deciding official may hear oral arguments in support of the agency protest at the same time as the scheduling conference, depending on availability of the necessary parties.
5437	the scheduling conference, depending on availability of the necessary parties.
5438	(g) Oral conferences may take place either by telephone or in person. Other parties (e.g.,
5439	representatives of the program office) may attend at the discretion of the deciding official.
5440	representatives of the program office) may attend at the discretion of the deciding official.
5441	(h) The following procedures apply to information submitted in support of or in response to an agency
5442	protest:
5443	process.
5444	(1) The protester and the agency have only one opportunity to support or explain the substance of
5445	the protest (either orally, in writing, or orally confirmed in writing).
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5447	(2) GSA procedures do not provide for any discovery.
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5449	(3) The deciding official has discretion to request additional information from either the agency or
5450	the protester. However, the deciding official will normally decide protests on the basis of information
5451	provided by the protester and the agency.
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5453	(4) Except as provided in paragraph (5)(ii) below, the parties are encouraged, but not required, to
5454	exchange information submitted to the Agency Protest Official for GSA.
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5456	(5) If the agency makes a written response to the protest, the following filing requirements apply:
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5458	(i) The agency must file its response to the protest with the deciding official within five (5)
5459	days after the filing of the protest.

(vii) All information establishing that the protester is an interested party for the purpose of

(viii) All information establishing the timeliness of the protest (see paragraph (b) of this

information in the response from the protester, it must obtain the approval of the deciding official.

files the response with the deciding official. If the agency believes it needs to redact or withhold any

(ii) The agency must also provide the protester with a copy of the response on the same day it

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5465 The deciding official will resolve the protest through informal presentations or meetings to the (i) 5466 maximum extent practicable.

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5468 An interested party may represent itself or be represented by legal counsel. GSA will not reimburse the party for any legal fees related to the agency protest.

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GSA will stay award or suspend contract performance in accordance with FAR 33.103(f). The stay 5472 or suspension, unless over-ridden, remains in effect until the protest is decided, dismissed, or withdrawn. 5473 The deciding official will make a best effort to issue a decision on the protest within twenty-eight

orally to the protester, the deciding official will confirm in writing within three (3) days after the decision. (m) GSA may dismiss or stay proceedings on an agency protest if a protest on the same or similar basis is filed with a protest forum outside of GSA.

(28) days after the filing date. The decision may be oral or written. If the decision is communicated

L.6 552.219-72 Preparation, Submission, and Negotiation of Subcontracting Plans (JUN 2005)

- An offeror, other than a small business concern, submitting an offer that exceeds \$500,000 (\$1,000,000 for construction) shall submit a subcontracting plan with its initial offer. The subcontracting plan will be negotiated concurrently with price and any required technical and management proposals, unless the offeror submits a previously-approved commercial plan.
- Maximum practicable utilization of small, HUBZone small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small business concerns as subcontractors is a matter of national interest with both social and economic benefits. The General Services Administration (GSA) expects that an offeror's subcontracting plan will reflect a commitment to assuring that small, HUBZone small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small business concerns are provided the maximum practicable opportunity, consistent with efficient contract performance, to participate as subcontractors in the performance of the resulting contract. An offeror submitting a commercial plan can reflect this commitment through subcontracting opportunities it provides that relate to the offeror's production generally; i.e., for both its commercial and Government business.
- GSA believes that this potential contract provides significant opportunities for the use of small, HUBZone small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small business concerns as subcontractors. Consequently, in addressing the eleven elements described at FAR 52.219-9(d) of the clause in this contract entitled Small Business Subcontracting Plan, the offeror shall:
- (1) Demonstrate that its subcontracting plan represents a creative and innovative program for involving small, HUBZone small, small disadvantaged, women-owned, veteran-owned, and servicedisabled veteran owned small business concerns in performing the contract.
- (2) Include a description of the offeror's subcontracting strategies used in any previous contracts, significant achievements, and how this plan will build upon those earlier achievements.
- (3) Demonstrate through its plan that it understands the small business subcontracting program's objectives and GSA's expectations, and it is committed to taking those actions necessary to meet these goals or objectives.

- (d) In determining the acceptability of any subcontracting plan, the Contracting Officer will take each of the following actions:
- (1) Review the plan to verify that the offeror demonstrates an understanding of the small business subcontracting program's objectives and GSA's expectations with respect to the program and has included all the information, goals, and assurances required by FAR 52.219-9.
 - (2) Consider previous goals and achievements of contractors in the same industry.
- (3) Consider information and potential sources obtained from agencies administering national and local preference programs and other advocacy groups in evaluating whether the goals stated in the plan adequately reflect the anticipated potential for subcontracting to small, HUBZone small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small business concerns.
- (4) Review the offeror's description of its strategies, historical performance and significant achievements in placing subcontracts for the same or similar products or services with small, HUBZone small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small business concerns. The offeror's description can apply to commercial as well as previous Government contracts.
- (e) Failure to submit an acceptable subcontracting plan and/or correct deficiencies in a plan within the time specified by the Contracting Officer shall make the offeror ineligible for award.

L.7 GENERAL INSTRUCTIONS FOR PREPARATION OF PROPOSAL

A Standard Form 33 "Solicitation, Offer, and Award", completed and signed by the offeror, constitutes the vendor's acceptance of the terms and conditions of this solicitation document. Therefore, the form must be executed by a representative of the offeror authorized to commit the offeror to contractual obligations.

The Government may award a contract based on the initial offers received, without discussion of such offers. Offerors are cautioned to include all relevant information in their proposals, as the Government may award without discussions, using only the information provided by the offerors in the initial proposal submission and customer-provided/Government-obtained past performance information.

Issuance of this solicitation does not commit the Government to pay any Bid and Proposal costs incurred by offerors in the preparation and submission of proposals, nor does it commit the Government to procure or contract for said services. The Contracting Officer is the only individual who can commit the Government to the expenditure of public funds in connection with this proposed procurement, and he/she will do so by means of formal award documents.

Proposals shall set forth current, accurate, and complete information as required by this solicitation document (including attachments). It is important to note that the penalties for making false statements in proposals are prescribed in 18 U.S.C. 1001.

Offerors submitting restricted data shall mark such data in accordance with Federal Acquisition Regulation (FAR) provision 52.215-12, which is incorporated by reference. FAR 52.215-12 states that, "Offerors or quoters who include in their proposals or quotations data that they do not want disclosed to the public for any purpose or used by the Government except for evaluation purposes, shall – (i) Mark the

title page with the following legend: "This proposal or quotation includes data that shall not be disclosed - in whole or in part – for any purpose other than to evaluate this proposal or quotation. If, however, a contract is awarded to this offeror or quoter as a result of – or in connection with – the submission of data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to the restriction is contained in sheets (insert numbers or other identification of sheets)"; and (ii) Mark each sheet of data it wishes to restrict with the following legend: "Use or disclosure of data contained in this sheet is subject to the restriction on the title page of this proposal or quotation".

The Government assumes no liability for disclosure of unmarked data for any purpose. Unless restricted, information submitted in response to this request may become subject to disclosure to the public pursuant to the provisions of the Freedom of Information Act (5 U.S.C. 551).

L.7.1 Submission of Proposals

A proposal submitted in response to this solicitation shall consist of two separate packages, placed in separate sealed envelopes/containers, and identified and appropriately marked as "Technical Proposal" and "Business Proposal". Both packages shall then be placed in one sealed submission container. The offeror shall enter the following information on the submission containers: (i) the deadline (hour and date) for receipt of proposals; (ii) the solicitation by number and title; and (iii) the offeror's name and address. The submission shall be addressed as follows:

General Services Administration Operational Contracting Staff (VC) 1800 F Street NW, Room G127 Washington DC 20405

Attention: Robert H. Corey Contracting Officer

Offerors shall submit an original and eight (8) paper copies of the Technical Proposal and an original and two (2) paper copies of the Business Proposal. Each proposal shall also be provided in electronic format using CD-ROM media in Microsoft Word or Microsoft Excel for Windows XP format, as appropriate. Each disk shall be clearly identified with the name of the offeror, the content of the CD-ROM, the solicitation number, and the date of the proposal.

This method of submission shall be used throughout the solicitation process, from the initial proposal to Final Proposal Revisions. After the initial proposals, each revision, if the determination has been not been made to award on the basis of initial proposal(s) only, shall also include the revision number, e.g., Revision 01, Revision 02, etc. When submitting a revision the offeror shall submit a complete proposal. The material added or changed in each revision shall be identified with a vertical line in the right hand margin. Identification lines from previous revisions shall be removed to ensure that only current revision changes are identified. This process will also be used to identify any segment of in the proposal that has been deleted. It is important to note that changes that are not provided in this manner may not be evaluated by the Government.

Offerors are advised that hand-carried proposals must be received in the place designated on the Standard Form 33, Solicitation, Offer and Award, before the time and date set for receipt of proposals. Hand-carried proposals are subject to FAR provision 52.215-01 entitled, Instruction to Offerors – Competitive Acquisition [Alternate I, Oct 1997]), dated May 2001, which is incorporated by reference.

GSA's hours of operation are 8:00 a.m. to 4:30 p.m. eastern time. Requests for preaward debriefings postmarked or otherwise submitted after 4:30 p.m. will be considered to be received the following business day. Requests for post-award debriefings delivered after 4:30 p.m. will be considered to have been received and filed the following business day.

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L.7.2 Technical Proposal Submission Requirements

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An original and eight (8) paper copies of the Technical Proposal, together with one (1) electronic copy using CD-ROM media as described in L.7.1 are required. No pricing information shall be included in the Technical Proposal. A 125-page limitation has been set for the Technical Proposal. Excluded from this limit are: the transmittal letter, title page, proposal index or table of contents, list of figures and abbreviations, organizational charts, and sample reports, and resumes of key personnel. (This limitation is based on the number of pages when printed single-spaced on 8 ½ x 11 inch paper with 1 inch margin in 12-point Tines New Roman or equivalent font size. Font size used in figures and tables can be 8-point or higher as long as the content is legible.)

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L.7.2.1 Technical Proposal

Offerors must submit a comprehensive Technical Proposal to provide a sound basis for evaluation by the Government. Proposals that merely offer to provide the requirements as specified in the solicitation, or "parrot back" the requirements of the solicitation without further elaboration, may be determined to be technically unacceptable.

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The Technical Proposal shall be organized as follows:

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- o Proposal Index
- 5641
- o Executive Summary
- o Experience and Past Performance
- 5643 o Technical Approach
- o Management Plan
- o Security Plan
- 5646 o Plan for Special Hiring

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L.7.2.1.1 Technical Proposal Index

As part of their Technical Proposals, offerors are required to submit a compliance index, using the format provided in Attachment 3, referencing the page and paragraph numbers that contain their response/methodology/narrative, on an item-by-item basis to all requirements of this solicitation.

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L.7.2.1.2 Executive Summary

The purpose of the executive summary is to present a brief introduction and overview of the proposal, including a summary of the offeror's capabilities and qualifications. The executive summary shall be written so that a layperson can easily grasp the essence of the technical approach and plans being proposed.

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L.7.2.1.3 Experience and Past Performance

In additional to general background information, the offeror must provide specific information about its experience in implementing, operating, and managing operations, services facilities, or contracts, and

associated contractual or budgetary arrangements, similar to the USA Contact requirement. The Government reserves the right to contact individuals and firms for which the offeror has performed such services in the past to evaluate the offeror's experience and past performance record.

L.7.2.1.3.1 Minimum Experience Qualifications Criteria

To be considered for an award under this solicitation, the offeror must have gained the following minimum experience qualifications during the five (5) years immediately prior to the date of the Government's receipt of proposals for this solicitation:

o at least three (3) years' general experience in providing information and referral services with monthly work volumes handled by agents of no less than 100,000 telephone inquiries and 7,500 e-mail inquiries per month;

> o at least one (1) year of specialized experience in providing information services in a multimedia environment, including the use of telephone, facsimile, e-mail, and web-based media;

at least three (3) years experience in providing information services in a multi-language environment; and

o at least two (2) years of specialized experience in handling case management in an information and referral service environment.

L7.2.1.3.1.1 Offerors Without Minimum Experience Qualifications

Minimum experience qualifications will be evaluated on a pass/fail basis. To be considered acceptable, an offeror's proposal must meet all of all of the minimum experience qualifications criteria set forth in L.7.2.1.3.1. For:

Large business offerors who do not meet all of the minimum experience qualifications criteria will be evaluated as lacking the inherent experience necessary for performance, and their proposal will be evaluated as unacceptable. At that point such firms will be eliminated from further competition for award under this solicitation.

Small business offerors who do not meet the minimum experience qualifications criteria will be referred to the United States Small Business Administration (SBA) for a Certificate of Competency under the procedures outlined in FAR Subpart 19-602. Based on evaluation by the SBA, such firms will either be evaluated as having sufficient experience for performance under this solicitation, or eliminated from further competition for award under this solicitation.

L.7.2.1.3.2 Documentation of Experience

The offeror shall provide the following information in its response to the revelant experience requirements of this solicitation:

A narrative describing its financial strength; core business lines; number of years of experience designing, implementing, operating and managing multi-channel contact centers; the number and location(s) of centers currently in operation, and their capacity for expansion; the type of services and business sectors the center(s) support; the total number of full-time and part-time employees working in those centers; the size and depth of

the technical and management staff dedicated to supporting contact center services; and the offeror's experience in managing teaming partners and/or subcontractors.

A narrative describing the offeror's experiences in the following key disciplines:

o recruiting, training, and retaining contact center personnel;

o supporting projects that have diverse language and skill requirements;

o evaluating and implementing integrated knowledge and case management solutions that support multiple access channels;

o developing and implementing quality assurance and improvement programs in support of contact center services including tools used to support the programs;

o supporting projects with stringent systems and information security requirements, similar to those required for Federal information systems;

o implementing electronic services to support automated self-help applications;

o short-notice ramping up operations to support crisis and/or high priority situations, including the provision of support 24 hours a day, 7 days a week;

o preparedness for and recovery from disasters and/or major service disruptions; and

o evaluating and implementing new technology.

 A narrative describing the operational and management processes and programs (e.g. Quality Assurance/Quality Improvement, Training, Disaster Recovery/Contingency Planning, Information Systems Security) implemented by the offeror that demonstrate a high commitment to service excellence and consistent and repeatable results. (Identify any processes that are certified by industry organizations, and indicate why such certifications may enhance the offeror's ability to meet or exceed project requirements.)

A narrative describing any specialized expertise and/or capabilities, including those offered by teaming partners and/or subcontractors, that may enhance the offeror's ability to meet or exceed project requirements. Describe any successful current and/or past associations with such teaming partners/subcontractors, and explain why they were effective.

L.7.2.1.4 Past Performance

The offeror shall provide the information identified below in its response to past performance. The offeror is cautioned to include all relevant past performance information (including corrective actions taken) in its proposal, as the Government may award without discussions, using only the information provided by the offeror in the initial proposal submission and customer-provided/Government-obtained past performance information. The offeror may be given the opportunity to address adverse past performance information; however, this exchange of information is for clarification only, and not for purposes of discussion.

A project profile identifying no more than three (3) contact center projects performed within the past five years that were similar in scope and complexity to the work required by the USA Contact Performance Work Statement. For each of the projects, the offeror shall provide the following information:

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5760	0	contract number, task order number, and/or other identification;
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5762	0	project title or name;
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5764	0	name of client/contracting entity with contact information;
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5766	0	role (prime or subcontractor);
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5768	0	period of performance (including the original completion date established at contract/task order
5769	· ·	award, and the actual completion date, with an explanation of any variance). If the referenced
5770		contract is no longer in effect, provide a brief explanation on why that is the case;
5771		contract is no longer in cheet, provide a orier explanation on why that is the case,
5772	0	geographic location(s) where contract work was performed;
5773	0	geographic location(s) where contract work was performed,
	_	names the phase numbers and a mail addresses (if available) of the Contracting Officer and
5774	0	names, the phone numbers, and e-mail addresses (if available) of the Contracting Officer and
5775		Contracting Officer's Technical Representative and/or Commercial Buyer and Project Manager;
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5777	0	total dollar value of contract (including value at initial contract/task order award, and the actual
5778		final price, with an explanation of any variance); and
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5780	0	annual work volumes by work type (e.g. inbound calls, e-mail, chat, facsimiles, fulfillment, etc.)
5781		and languages supported.
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5784	For ea	ch of the projects listed in Section L.7.2.1.4, the offeror shall provide a narrative describing the
5785		and complexity of the project, including:
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5787	0	technical objectives of the project and the scope of work;
5788	O	technical objectives of the project that the scope of work,
5789	0	relevancy of the selected project to the nature of the work to be performed under the USA Contact
5790	U	program;
5791		program,
5792	_	complexity and dynation of the phase in (start up) and phase out (transition) processes. Describe
	0	complexity and duration of the phase-in (start-up) and phase-out (transition) processes. Describe
5793		any innovative approaches that were used to minimize disruption or degradation of service to
5794		customers during the phase-in and/or phase-out process;
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5796	0	complexity of the contact center inquiries, type of end-users served, operating hours, language
5797		proficiency requirements and length of Information Specialist (IS) training;
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5799	0	complexity of area knowledge and case-management requirements;
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5801	0	complexity of information systems security requirements; and
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5803	0	frequency and complexity of reporting requirements. (Provide a sample report package for the

For each of the above projects, the offeror shall provide a narrative describing overall project performance, including:

- o project objectives and performance goals and whether they were achieved;
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 5813 o a summary of the financial benefits the project delivered to the customer, including any return on investment calculation that qualifies the financial benefits;
- o major deliverables produced;

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- o variations in work volumes and how they were managed, including unforeseen volume spikes in crisis and high-priority situations;
- 5821 o two unanticipated challenges and the corresponding remedial actions;
 - o any innovative technologies and/or re-engineered business processes proposed and adopted by the customer that resulted in service improvement and/or cost reduction;
 - o any performance awards and/or special recognition received during the performance period of the project for superior achievement and/or significant cost savings; and
 - o any problems or issues that occurred, and the corrective action taken, that may impact the offeror's past performance evaluation by its customer.

For the selected project(s), the offeror shall provide the name of the individual to whom the Past Performance Survey Questionnaire (Attachment J.1) is to be sent. The contact information shall include the individual's name and position; the name of the company; the project title; the point of contact's address; the phone and fax number; and, where available, his/her e-mail address. The offeror shall direct the individual(s) who will be completing the Questionnaire to submit the completed document directly to:

5838 General Services Administration 5839 1800 F Street NW, Room G127 5840 Washington DC, 20405 5841 Attention: Robert H. Corey

Questions may also be sent as a ".pdf" file via e-mail to: bob.corey@gsa.gov.

The offeror is responsible for informing the selected customers of the need to address the experience factors identified in Section L.7.2.1.3.1 in completing the questionnaire, as well as for alerting them that the completed questionnaire must be received by the Contracting Officer no later than the proposal due date set forth in the Standard Form 33 issued with the solicitation.

L.7.2.1.5 Technical Approach

The offeror shall describe how it intends to meet the requirements specified in Section C - Performance Work Statement. The description shall include the following:

5853 L.7.2.1.5.1 Services to be Provided

The offeror shall describe its proposed solution or approach for providing each of the services and support specified in Sections C.3 of the Performance Work Statement, including any authentication process used to validate users/systems access to these services. Descriptions should demonstrate an in-depth understanding of the nature of the services and support to be provided; how the offeror will fulfill the requirements; what technology and tools will be used to support the services; and the industry best practices that will be employed by the offeror to accomplish task objectives and performance goals. The

offeror shall describe plans and approaches detailing the methods by which proposed services and support will be implemented. The proposal shall not merely offer to conduct an investigation or perform work in accordance with the stated requirements, but shall outline the actual approach and/or methodology proposed. Insightful responses that describe proven state-of-the-art methods, and solutions that demonstrate the offeror's ability to quickly undertake and successfully complete the required contract tasks are preferred.

L.7.2.1.5.2 Facilities and Technology Infrastructure

The offeror shall provide a detailed description of the proposed facilities and technology infrastructure that will be used in support of this contract, including the following:

proposed contact center site(s) for supporting tasks to be performed under this contract, with an explanation on why the site(s) were selected. Provide a description of how the offeror intends to utilize scalable solutions to meet a diverse range of agency requirements, and the criteria and processes that it will use to evaluate and select new contact center sites to ensure compliance with the requirements set forth in Section C.5 of this solicitation;

o proposed systems architecture in block diagram form with appropriate explanation and identification of site location(s), hardware, network devices, etc., including those used for primary and backup operations. (Identify system capacity and scalability where applicable);

o the proposed technology solution for each of the requirements listed in Sections C.6, and C.7 of this solicitation, including the proposed technology and any special capabilities that are unique to the solution:

o proposed technology solutions and facilities for training;

o proposed technology solutions to support an effective quality assurance program; and

o a stipulation that the proposed technology solutions will be fully accessible by individuals with disabilities as required by Section 508 of the Rehabilitation Act Amendments of 1998 with an explanation of how then technology supports the stipulation.

L.7.2.1.5.3 Contingency/Disaster Recovery Planning

The offeror shall submit a plan that describes its approaches for contingency/disaster recovery planning and implementation. The plan shall identify potential risks as well as the safeguards necessary to prevent them from occurring. The plan shall include, at a minimum, the following:

 o an alternative set of steps to minimize the impact should risk prevention fail;

 a definition of the backup and restoration processes that will be implemented and the precise steps necessary to recover as quickly as possible, including recovery procedures for physical facility; voice, data, and desktop systems and applications; communications networks; electrical service; customer access points; partners and procedures; and staff;

o a definition of the roles and responsibilities of Contractor and Government personnel during contingent and disaster events, including provisions for training to prepare them to respond to such events; and

o implementation procedures to test and execute the plan on a regular basis to ensure preparedness for such events. Provide a sample of such a contingency test plan.

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L.7.2.1.5.4 **Emergency Response Capability**

The offeror shall provide a description of its capability and procedures for short-notice ramping up and ramping down of its contact center operations in crisis or high priority situations including any past experience with such contingency operations. The offeror shall quantify its capacity to provide emergency contact center services in terms of capacity, operating hours, staffing, language support, and estimated ramp-up and ramp-down time. This section of the proposal will describe the following:

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use of excess capability versus additional infrastructure;

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plans for rapid addition of qualified information specialists;

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plans for processing security clearances for, and training of, newly hired information agents; and

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> o method of accounting for all information specialist hours in a rapidly changing, volume surge environment.

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L.7.2.1.6 **Management Plan**

5930 The offeror shall submit a Management Plan for accomplishing the work specified in this solicitation. 5931 The plan shall include, at a minimum, sections and structure described as follows:

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L.7.2.1.6.1 **Program Management Plan**

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The offeror shall provide a detailed description of the program management structure and the support resources that it will provide to fulfill project requirements. This includes providing the staff identified in Section C.4 of this solicitation and support for project and site management, technology, security, human resources (including recruiting and training), finance, and quality assurance. Identify key positions within the management structure that are considered essential to successful project execution, and list the experience and educational criteria to be used to qualify candidates for these positions. Identify any operational and management processes and programs (e.g. Quality Assurance/Quality Improvement, Training, Disaster Recovery/Contingency Planning) implemented that demonstrate the offeror's high commitment to service excellence and consistent, repeatable results.

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the chain of command for managing this contract; and the organizational components that will support this contract. In relation to the organizational structure, the offeror shall describe the management, technical, administrative and contractual delegations of authority within the organization. The offeror shall further describe the lines of authority and roles and responsibilities of all corporate entities (including subcontractors and/or teaming partners, if any) together with the escalation procedures for problem/dispute resolution. Provide a description of how the offeror's teaming partners and/or subcontractors (if any) will be managed to

The Plan shall include an organization chart that identifies the entire chain of command in the organization;

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ensure that performance objectives are met.

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The Plan shall also include a description on methodologies and approaches for providing timely operational and management reports to meet the requirements identified in Section C.11 of this solicitation.

5957 L.7.2.1.6.2 Human Resources Management Plan

The offeror shall provide a draft Human Resources Management Plan, which shall include relevant details of its plans for and approaches to recruiting, staffing, training, and retaining employees identified in Section C.8 of this solicitation. In addition, the offeror shall provide a description of its methods, procedures, and qualification requirements for recruiting qualified and competent contact center personnel, including: those required to provide foreign language support; staffing during start-up and contract performance periods; and personnel necessary to perform the tasks required by the contract, together with contingency plans for human resource acquisition during surge operations. The offeror shall identify the corresponding wage rate category as defined by the Department of Labor's wage determinations that will be used to compensate each level of contact center staff covered under the Service Contract Act. Provide a description of the processes and methodologies that will be used in the recruiting process for personnel screening and to ensure compliance with Homeland Security Presidential Directive 12 (HSPD-12).

L.7.2.1.6.3 Performance Management Plan

The offeror shall provide a detailed description of the processes and methodologies to be implemented to ensure effective performance management, including service-level monitoring; workload forecasting; scheduling; service recovery (from system failures, disasters, etc.); problem identification and resolution; problem notification; and contingency planning and escalation. The offeror shall describe the processes and methodologies that it will follow in projecting and monitoring workload, performance objectives, and expenditure of the authorized funding level for the project, as well as for keeping the Government appraised of the situation in the event of an adverse program event. The offeror shall describe corrective actions and contingent plans that it will take to balance workload and performance objectives with funding allocations on an ongoing basis until the problem is corrected.

L.7.2.1.6.4 Quality Control/Quality Improvement Plan

The offeror shall provide a detailed description of the processes and methodologies it will utilize for effective quality assurance, including the offeror's plan for developing, operating, and maintaining a quality control program to effectively address the following areas: staffing; training; operations; contract deliverables; performance management; process engineering; service delivery; service improvements; and customer satisfaction. The Contractor shall describe the processes and methodologies that it intends to follow in conducting performance assessment evaluations.

L.7.2.1.7 Security Plan

The offeror shall provide a detailed description of its methodology for complying with the information systems security requirements set forth in Section C.3.5.5 of the Performance Work Statement. The description shall address existing and planned security controls (management, operational, and technical) that it will use to protect the confidentiality, integrity, and availability of information, and to ensure thereby that IT systems are protected. It shall also indicate whether these controls are in compliance with the recommended security controls for Federal information systems set forth in NIST Special Publication 800-53. The offeror shall describe how it plans to achieve certification and accreditation of its information systems prior to award of any initial task order hereunder. Identify any previous experience with the certification and accreditation process that may enhance the ability of the offeror to successfully obtain certification and accreditation for information systems to be used to support task requirements under this contract. The offeror shall provide documented evidence of the existing policies and procedures that will be used to conduct periodic assessments of the security controls to ensure their effectiveness on an ongoing basis. Identify any existing and planned arrangements within the offeror's organization, or with third party vendors, to conduct and document these assessments on an ongoing

basis. Identify methodologies and approaches for the development and implementation of plans of action designed to correct deficiencies in and reduce or eliminate vulnerabilities of information systems.

L.7.2.1.8 Plan for Special Hiring

The offeror shall describe how it plans to meet the minimum five (5) percent human resource recruitment goal for the services of blind or severely disabled individuals through organizations that are affiliated with the Committee for Purchase from People Who Are Blind or Severely Disabled (National Industries for the Blind [NIB] and National Industries for the Severely Handicapped [NISH]). The offeror shall identify the qualified organization(s) through which these individuals will be hired, and describe any current and past association with such organizations in supporting similar projects. The offeror shall clearly describe its recruitment, hiring, training, and retention processes, and the roles and responsibilities of the NIB and NISH organization(s) within those processes, as well as any compensation arrangements between the offeror and the associated organizations.

L.7.3 Business Proposal Submission Requirements

An original and two (2) copies of the Business Proposal and one (1) electronic copy using CD-ROM media (in Microsoft Word or Excel Windows XP format, (as appropriate) are required. Business Proposals shall consist of:

o a cover letter on company letterhead stipulating that the proposal shall remain in effect for two hundred seventy (270) days;

o a signed Standard Form 33 (Solicitation, Offer and Award);

o a completed copy of Section B, Schedule of Supplies or Services;

o a fully prepared Small Business Subcontracting Plan (large businesses only);

o a fully executed copy of Section K, Representations, Certifications, and Acknowledgments; and

o an itemized statement of any exception(s) taken to any portion of the solicitation with a complete explanation for such exception(s), or a statement that no exceptions are being taken.

Offerors shall insert "fully burdened" prices in the spaces provided in Section B, Schedule of Supplies or Services, of this solicitation. For the purposes of this solicitation, the term "fully burdened" is defined as Wage Determination-compliant direct labor rates, direct material (if applicable), plus overhead costs from all applicable overhead pools, plus general and administrative expenses, plus proposed profit margin for this program.

A direct labor rate that is "Wage Determination-compliant" is one that meets the Federal minimum wage requirements in addition to the Health, Welfare and other benefit requirements of the Occupation Code for each employee being proposed pursuant to the United States Department of Labor Wage Determination currently in effect for the location (county and state) where the services are to be performed. As part of the Business Proposal, the offeror shall cite the applicable Department of Labor Wage Determination, including revision number and date that he/she used in preparing the proposal.

All prices proposed shall be considered to be ceiling rates that can not be exceeded when preparing a quotation for a task order under an awarded contract. If awarded a contract pursuant to this solicitation, the Contractor may propose a lower rate for any or all CLINs on a task-by-task basis. Part of the Contractor's strategy may include offering services at a location(s) in the United States that is different

6055 from the location used to prepare this proposal. Offerors are cautioned that, at the task order level all 6056 offered rates must be Wage Determination-compliant. This means that rates must meet the requirements 6057 of the Department of Labor Wage Determination in effect at the time the task quotation is prepared for the 6058 location (county and state) where the quoted services are to be performed.

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Prices shall be provided for each contract period (the two-year base period, each of the four [4] two-year option periods, and each of the three [3] one-year extended periods).

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L.7.3.1 Business Proposal

6064 The Business Proposal shall be organized as follows: (i) Cover letter and Standard Form 33 signed by a 6065 company official who is authorized to financially and contractually bind the company for the full amount of the proposal; (ii) Pricing Tables and an itemized list of all assumptions, and the rationale for each 6066 6067 assumption, used in preparation of the pricing tables; (iii) Small Business Subcontracting Plan; and (iv) a 6068 completed copy the representations, certifications and other statements of offerors in Section K of this 6069 solicitation, of all terms and conditions of the solicitation, as called for above.

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Subcontracting Plans shall be prepared using the format provided for in Section J. Attachment 2 of this solicitation entitled, "Small Business Subcontracting Plan Outline (Model)". A Small Business Subcontracting Plan is required as part of your proposal if your firm does not qualify as a small business under the North American Industry Classification System code of 519190.

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The Government will evaluate all Business Proposals received. The purpose of this price analysis will be to develop a negotiation position that permits the Contracting Officer and the offeror the opportunity to reach agreement as to a fair and reasonable price. A fair and reasonable price does not require that agreement be reached on every element of cost, nor is it mandatory that the agreed-to price be within the contracting officer's initial negotiation position. Technical information submitted in the Business Proposal will not be evaluated as part of the Government's evaluation of the Technical Proposal.

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L.7.3.1.1 Pricing Structure

6085 6086 The offeror shall include as part of its Business Proposal completed Price Tables for the contract base period, and for each of the option periods, for each Category of Services" described in the Section B, Schedule of Supplies or Services. In addition, the offeror shall include completed price tables for each of the Extended Performance Periods. The price schedule in Section B is comprised of four (4) main service categories, each of which must reflect *fully-burdened* prices:

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6090 Project Start-Up – identify one-time charges associated with project start-up for Facility L.7.3.1.1.1 6091 and Equipment, Initial Training, Knowledge and Content Development, and Project Implementation Support. 6093

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Project Management – identify monthly recurring charges associated with the performance L.7.3.1.1.2 of all technical and management services as defined in Section C.3.5, Technical and Management This service category includes a Core Project Management Support component and an Incremental Project Management Support component.

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6099 Automated and Other Support Services - identify recurring charges for providing 6100 Automated and Other Support services as defined in Sections C.3.1 and C.3.3. This service category 6101 includes a service initiation component and a recurring monthly or usage sensitive component.

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Attended Services - identify the recurring charges for providing Attended Services based L.7.3.1.1.4 on the requisite skill levels as defined in Sections C.3.2 and C.4, respectively. The "Information

Specialist (IS) Hourly Rate" is the fully burdened fixed hourly rate to be paid by the Government to the Contractor for each hour of work performed as defined in Section H.8. The fixed hourly rate shall include the cost for all contact center IS staff and support personnel (e.g. quality monitoring personnel, trainers, etc.) required to support those ISs in their performance of the Project. The IS Hourly Rate shall not include any billable categories included in the Project Management fee described in Section 7.3.1.1 b above. The offeror shall identify the wage rate category and wage rate used to develop the fully burdened IS hourly rate for each skill level. The applicable Department of Labor Wage Determination will also be identified by number, revision and date. Failure to include the wage category and rate information or an explanation as to why such information was not provided may render the offeror's proposal "non-responsive". The offeror shall include the multiplication factors for accommodating tasks that require above/below average IS-to-QA personnel ratios.

L.7.3.1.2 Pricing Tables

The offeror shall include, as part of its Business Proposal, completed Price Tables for the contract base period and each of the option periods for each "category of services" described in the Section B Schedule of Supplies or Services. In addition, the offeror shall include completed price tables for each of the Extended Performance Periods. The offeror shall include prices for supporting each of the services requested using the pricing tables provided in Section B.2. Failure to provide supporting documentation may render the offeror's proposal "non-responsive".

Note: Extended-period pricing will only be used in task orders awarded before the end of the contract term if the task order's period of performance will extend beyond the end of the contract term.

The offeror's Pricing Tables must demonstrate both cost realism and balance. The following information is a guide to what each of the terms mean:

Cost realism exists when the estimated proposed cost elements are realistic for the work to be performed, reflect a clear understanding of the requirements; and are consistent with the unique methods of performance and materials described in the offeror's technical proposal.

Balanced pricing can best be defined by describing its opposite: unbalanced pricing. Unbalanced pricing exists when, despite an acceptable total evaluated price, the price of one or more contract line items is significantly over or understated as indicated by the application of cost or price analysis techniques.

L.7.3.2 Pricing Support Documentation

If required by the Government, the offeror shall furnish detailed supporting documentation for any or all of its prices. This may involve all information up to and including a complete breakdown of each element of cost. The Government will only ask for this documentation if it is necessary to reach a determination on the fairness and reasonableness of pricing. Failure to provide supporting documentation when requested to do so may render the offeror's proposal "non-responsive".

L.7.4 Oral Presentations

- a. At the option of the Government, offerors may be required to provide oral presentations to the proposal evaluation team at a Government site. If the Government requires an oral presentation, it will occur after competitive range is established. Offerors will receive a minimum of five (5) business days notice prior to the requested time for presentation. The total duration of the oral presentation shall be limited to one (1) hour or less. A question and answer period following the presentation will be limited to 45 minutes.
- The presentation shall include, but need not be limited to:

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6155 c)	Experience and Past Performance
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6157 c)	Technical Approach
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6159 c)	Management Plans
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6161 c)	Security
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6163 c)	Plan for Special Hiring
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The Government will allow up to four (4) representatives from each offeror's team to attend the oral presentation. Information presented during the oral presentation, and any subsequent written discussion items, may be used by the Government to augment the offeror's written proposal for the purposes of evaluation hereunder.

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L.7.5 Technical Assistance in Evaluation of Proposals

Offerors are hereby notified that the Government may contract with a private company whose lines of business do not extend to the services called for herein to assist in the evaluation of the entirety or portions of the technical and/or Business Proposals submitted by offerors in response to this solicitation. This shall include, but not be limited to, data marked as proprietary by offerors.

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6177 6178 Such third-party contractor involvement may include one or more of the following activities: preparing responses to vendor questions; participating as a member of technical and/or price evaluation panel(s); attending oral presentations; conducting oral discussions with members of the Government's evaluation panel(s); and preparing written evaluation report(s).

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Any such third-party contractor will only play an advisory role and their employees will not be voting members of either evaluation panel.

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All third-party contractor personnel assisting in the review and/or evaluation of technical and/or Business Proposals submitted by offerors in response to this solicitation as described herein will be required to sign non-disclosure agreements to protect the offerors' propriety information. 6187 <u>SECTION M</u>
6188 <u>EVALUATION CRITERIA</u>
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M.1 BASIS FOR AWARD

The Government intends to evaluate proposals and award contract(s) without discussions with offerors, except that offerors may be given an opportunity to clarify minor irregularities or apparent clerical mistakes in their submissions. Therefore, the offeror's initial proposal should contain the offeror's best terms from a price and technical standpoint.

However, the Government reserves the right to conduct discussions if the Contracting Officer later determines them to be necessary. If the Contracting Officer determines that the number of proposals that would otherwise be in the competitive range exceeds the number at which an efficient competition can be conducted, the Contracting Officer may limit the number of proposals in the competitive range to the greatest number that will permit an efficient competition among the most highly-rated proposals.

This solicitation will result in the award of one or more indefinite delivery, indefinite quantity (IDIQ) contracts for complete managed multi-channel contact center services. Award(s) will be made to the responsive, responsible offeror(s) whose proposal(s) provide the best-value solution to the Government.

The first award will be made to the responsive, responsible offeror which provides the best-value solution. The next award will be made to the responsive, responsible offeror which provides the second best-value solution. Additional awards will follow the same procedure, up to a maximum of ten (10) awards. In determining best-value, technical approach is significantly more important than price.

M.2 EVALUATION PROCESS

Technical Proposals will initially be evaluated against the minimum experience requirements in Section L.7.2.1.3.1 of this solicitation. This evaluation will be conducted on a pass/fail basis. In order to pass, an offeror must demonstrate that it meets all of the minimum experience qualifications set forth in Section L.7.2.1.3.1, and that all of that experience has occurred within the five (5) years immediately prior to the deadline for receipt of proposals.

Offers that have not demonstrated that the offerors meet the minimum experience qualifications will be processed as follows:

- o If the proposal from a large business firm, as defined by NAICS 519190, it will be evaluated as unacceptable and that offeror will not be considered for the award of a contract hereunder.
- o If the proposal is from a small business firm, as defined by NAICS 519190, it will be referred to the United States Small Business Administration (SBA) for a Certificate of Competency under the procedures are outlined in Federal Acquisition Regulation 19-602. Based on evaluation by the SBA, such firms will either be evaluated as having met the minimum experience requirement for performance under this solicitation, or will be evaluated as unacceptable. Small business offerors evaluated as unacceptable will not be considered for the award of a contract hereunder.

Technical Proposals that pass the minimum experience requirements evaluation will then be reviewed for compliance with the solicitation requirements, in accordance with the evaluation factors set forth below.

Evaluation of an offeror's Technical Proposal will be conducted independently of the evaluation of its Business Proposal. Technical sub-factors will be rated individually using a numerical rating scale. A weighting factor will be applied to the numerical rating to calculate the weighted rating for each sub-factor. The weighted numerical rating of each technical sub-factor will be combined to derive an overall rating for the relevant technical evaluation factor.

The numerical ratings in Table M.2-1 will be used by the Government to rate the evaluation sub-factor elements of an offeror's Technical Proposal.

Table M.2-1 Sub-Factor Rating Scale for Technical Proposals

Rating	General Description
5	The sub-factor clearly meets and consistently exceeds the Government's stated requirements in all areas. The information provided suggests a very low risk to the Government of less than satisfactory performance on the part of the offeror.
4	The sub-factor meets the Government's stated requirements in all areas, and in some areas the offeror exceeds the Government's stated requirements. The information provided suggests a low risk to the Government of less than satisfactory performance on the part of the offeror.
3	The sub-factor meets the Government's stated requirements in all areas. The information provided suggests a moderate risk to the Government of less than satisfactory performance on the part of the offeror.
2	The sub-factor meets the Government's stated requirements in all areas, but in some areas, it barely meets the Government's stated requirements. The information provided suggests a substantial risk to the Government of less than satisfactory performance on the part of the offeror.
1	The sub-factor fails to meet any of the Government's stated requirements. The information provided suggests a very substantial risk to the Government of less than satisfactory on part of the offeror

M.2.1 Evaluation of Technical Proposals

The Government will evaluate the offeror's proposed solutions and approaches for meeting or exceeding contract requirements based on the following considerations, among others that may be deemed relevant by the Government.

Technical proposals will be evaluated using a weighted numbering system. The purpose of weighting the factors and sub-factors is to ensure the achievement of program objectives by emphasizing the more important technical evaluation criteria.

 Sub-factors: The rating that each sub-factor is awarded (based on the criteria in Table M.2.1) will be multiplied by a predetermined weighting factor. The sum of the weighting for all sub-factors within a technical factor will equal 100 percent. The aggregate value of all weighted sub-factors will become the score for that technical factor.

Technical Factors: Once the score each technical factor is known, those scores will be weighted by multiplying each of the scores by predetermined weighting factor. As with sub-factors, the weighting for all technical factors will equal 100 percent. The technical evaluation score for the proposal will be the sum of all weighted technical factor scores.

The following technical evaluation factors are listed in descending order of importance:

o Experience and Past Performance

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6271 6272	o Technical Approach
6273 6274	o Management Plans and Processes
6275 6276	o Security
6277 6278	o Special Hiring
6279	M.2.1.1 Experience and Past Performance (Factor 1)
6280 6281 6282 6283 6284	The Government will evaluate the offeror's experience and past performance based on the information to be provided in accordance with Sections L.7.2.1.3 and L.7.2.1.4 of this solicitation. The following subfactors are applicable to this technical evaluation factor and are listed in descending order of importance: • Demonstration of past performance
6285	Relevancy of corporate experience and core competencies
6286	 Soundness of Operational and Management Plans and processes
6287	 Demonstration of experience in key disciplines
6288	 Documented successes with teaming partners and/or subcontractors
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6290	M.2.1.2 Technical Approach (Factor 2)
6291 6292 6293 6294	The Government will evaluate the offeror's Technical Approach based on the information to be provided in accordance with Section L.7.2.1.5 of this solicitation. The following sub-factors are applicable to this technical evaluation factor and are listed in descending order of importance:
6295	o Understanding of services to be provided
6296	 Adequacy facilities and technology infrastructure
6297	o Preparedness for disaster recovery/contingency planning
6298	 Documented emergency response capability
6299 6300	M.2.1.3 Management Plan (Factor 3)
6301 6302 6303 6304	The Government will evaluate the offeror's Management Plan based on the information to be provided in accordance with Section L.7.2.1.6 of this solicitation. The following sub-factors are applicable to this technical evaluation factor and are listed in descending order of importance:
6305	o Soundness of the Program Management Plan
6306	o Soundness of the Human Resources Management Plan
6307	o Soundness of the Performance Management Plan
6308 6309	 Soundness of the Quality/Assurance/Quality Improvement Plan
6310	M.2.1.4 Security Plan (Factor 4)
6311 6312 6313	The Government will evaluate the offeror's Security Plan based on the information to be provided in accordance with Section L.7.2.1.7 of this solicitation. The following sub-factors are applicable to this technical evaluation factor and are listed in descending order of importance:

6314 6315	 Knowledge of Federal information systems security requirements
6316	o Appropriateness and effectiveness of security controls
6317	o Soundness of offeror's plan to attain certification and accreditation
6318 6319	o Soundness of policies and procedures for conducting on-going risk assessments
6320	M.2.1.5 Plan for Special Hiring (Factor 5)
6321 6322 6323 6324	The Government will evaluate the offeror's Special Hiring based on the information to be provided in accordance with Section L.7.2.1.8 of this solicitation. The following sub-factors are applicable to this technical evaluation factor and are listed in descending order of importance:
6325	 Soundness of the recruitment, hiring, training and retention processes
6326 6327	 Clarity of the proposal regarding the roles and responsibilities between the offeror and partner organization(s)
6328 6329 6330 6331	 Documented historical successes in the employing blind and/or severely disabled individuals for similar work
6332	M.3 BUSINESS PROPOSAL EVALUATION
6333	M.3.1 Pricing Evaluation Tool
6334 6335 6336 6337 6338 6339	The Government will evaluate contract line item (CLINs) for all contract years (including Option Years and Extended Periods) in each responsive Business Proposal received. This will be accomplished by applying a uniform set of anticipated requirements to a standard USA Contact-developed source selection pricing tool. The CLINs and quantities will provide the price evaluators with comparable representative samplings of services that may be required throughout the term of the contract.
6340 6341 6342 6343 6344 6345 6346 6347 6348	The Government understands that there is significant risk in providing ceiling prices over a fifteen thirteen year period. On the one hand, the offeror must have sufficient escalation in its pricing model to ensure that the ceiling prices are high enough to allow it to bid on requirements in the later years of the contract. On the other hand, the offeror must make sure that the escalation factor is not so steep that it prevents the company from receiving a contract award in the first place. It is obvious that the farther you go into the future, the harder the analysis becomes, and the greater the risk of over-or-under estimating. For this reason, the pricing tool will contain weighting factors. Weighting, for the purposes of the price evaluation, will be accomplished as follows:
6349	o Base Period and Option Periods 1 and 2 (Years 1 through 6): Pricing is rated "Very Important"
6350	o Option Periods 3 and 4 (Years 7 through 10): Pricing is rated "Moderately Important"
6351 6352	o Extended Periods (Years 11 through 13): Pricing is rated "Least Important"

M.3.2 Basis for Evaluation

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Business Proposals will be evaluated based on the following factors: price realism, price reasonableness, and total evaluated price.

Price Realism - Price realism will be evaluated to ensure that the proposed prices reflect a clear understanding of the work and skills required for contract performance. Business Proposals determined to be unrealistic in terms of technical commitment, or that appear to be unrealistically low in price, will be deemed reflective either of an inherent lack of technical competence, or of failure to comprehend the complexity of and risks inherent in the contract requirements.

Price Reasonableness - Business Proposals will be evaluated to ensure that proposed prices are consistent with industry standards for similar requirements, and are not excessive in comparison with such standards. Proposed prices that are determined to be unreasonable will be rejected.

Price realism and price reasonableness will be evaluated on a pass/fail basis. If an offer does not demonstrate both price realism and price reasonableness, it will be evaluated as unacceptable and the offeror will be eliminated from consideration for the award of a contract

Total Price – The Government will apply estimated quantities for each Contract Line Item Number (CLIN) in evaluating the total price of each proposal. The estimated quantities that will be used for evaluation purposes are based on the Government's best estimate of current and future requirements. These estimated quantities will be applied consistently to all proposals to obtain the total evaluated price for the base and all option and extended performance periods. Total pricing that is evaluated as lacking balance (see Section L.7.3.1.2) may be rejected if it is determined that the lack of balance poses an unacceptable risk to the Government.